

ONTARIO CHIROPRACTIC ASSOCIATION

PATIENT MANAGEMENT PROGRAM

PUTTING EXPERIENCE INTO PRACTICE

PMP Manitoba Manual

December 2010

Contents

Additional Help	5
Getting Into PMP	5
Main Appointment Screen Description	6
Moving Around the Appointment Book	9
Hotkeys from the Appointment Book	9
Function Keys	9
Customizing PMP for Your Office	10
Creating Letterhead	10
Doctor Defaults	12
Computer Defaults	13
Other Setup Menu Options	13
Appointments	22
Book an Appointment by Clicking into a Timeslot	22
F2 Appointment Grid	23
Appointment Booking after Posting Activity	24
F3 Show Our Day	24
F5 Show My Week	25
Appointment Status	25
<i>Changing the Appointment Status</i>	26
Rescheduling Appointments	26
Hide Invalid Appointment	27
Multiple Appointment Booking	28
Posting Activity	32
Accessing Patient Activity	32
Posting Patient Transactions	33
Posting Payments Only	35
Patients Who Do Not Have Appointments (Walk-Ins)	35
Discount	36
Refund	36
Inventory Refund	37
Activity Date	38
Editing and Deleting Transactions	39
Transfer Credits / Balances between Patients	40
Transfer Credits / Balances between Practitioners	40
Returned Cheques	42
Gift Certificate	42
Write Offs	44
Payment Distribution Screen	45
Add a New Patient & Patient Information	47
Accessing the New Patient File	47
The Personal tab	47
The Comments tab	48
The Pop Ups tab	48
The Manitoba tab	48
The Bill To / Employers tab	49
The EHC tab	49
The Appointments tab	49
The Account / Activity tab	49
The Lower Taskbar	49
Advanced Features within the Patient File	50
Default Activity	50
Envelopes / Labels	51
Related Patients	52
Pop Ups	53
Edit Comments	54
Active Email	55
Edit Activity Comments	55
Manitoba Health Services Commission	56
Manitoba Health Billing	57

Processing Manitoba Health Reconciliations	58
Handling On Screen Rejections during Reconciliation	58
Dealing with No Payment Recorded	59
Manitoba Public Insurance	60
Set Up an MPI Patient	60
Posting Transactions for MPI Patients	60
Manitoba Public Insurance Forms	61
Posting Manitoba Public Insurance Activity	65
Billing Manitoba Public Insurance	65
Manitoba Public Insurance Reconciliation	66
MPI Write Offs	66
Worker's Compensation Board	67
Set Up a WCB Patient	67
Posting Transactions for WCB Patients	67
Worker's Compensation Board Forms	68
Worker's Compensation Board Billing	71
Worker's Compensation Board Reconciliation	72
WCB Write Offs	72
Reports	73
Summary Sheets	73
Statements	75
Appointment Book	77
Reminder List	78
Past Due Recall List	79
The Long Term Recall List	79
Accounts Receivable	80
Patient Query by Doctor or Office	80
Query Customization	81
Labels	82
Fee History Report	82
Patient Referral Activity Report	83
Exporting Documents	83
Create E-mail Distribution List from PMP	85
Merge Letters	85
Security	89
Login	90
Creating or Changing Passwords	91
Edit Date	91
Account Edit Journal	92
Backup, Utilities and Housecleaning	93
Backup	93
Test Restore	94
Restore	95
Utilities	95
Error Checking	96
Defragment	96
Deleting Patients	97
Accounts Receivable	97
Documents for Printing	98
PMP Word Pad	98
APPENDIX	99
Manitoba Health Diagnostic Codes	99
Manitoba Health Disposal Codes	100
Workers Compensation Board Fees	101
Workers Compensation Chiropractic X-ray Fees	102
Manitoba Public Insurance Fee Schedule	103
X-Ray Fee Schedule	105
Manitoba Health Electronic Billing Instructions	106
Download the Reconciliation	111
Renaming Your Manitoba Remit File	112

PMP Support

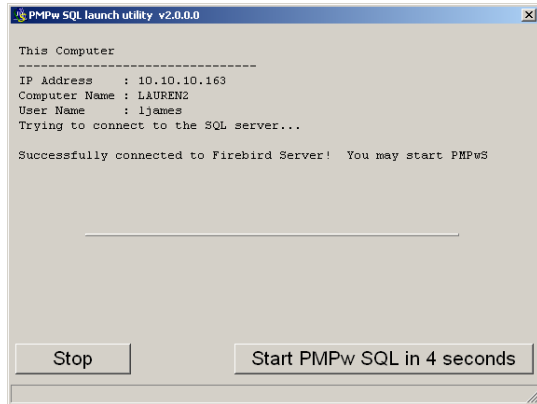
Support Line	416-860-7199 / 1-800-561-7361
E-mail	support@chiropractic.on.ca
Fax	416-860-0857
Address	20 Victoria St, Suite 200 Toronto, Ontario M5C 2N8
Website	www.chiropractic.on.ca

Additional Help

Each PMP CD includes a full program, the latest update, and a network version of the PMP. Also included are a copy of this Manual, the OCF Handbook and PMP tutorials. We have included newsletters, training information, various programs and many other pieces of information that you may find helpful. Keep your CD in a safe place at the office – replacements are \$25.

Getting Into PMP

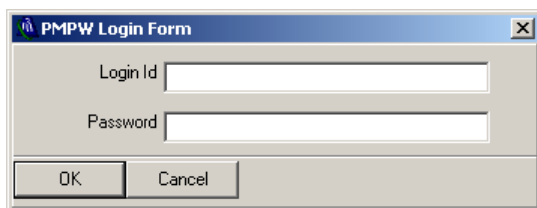
Open PMP by clicking the **PMP SQL** icon on the desktop. The SQL Launch screen will appear. Click the **Start PMPw SQL in [#] seconds** button before the countdown if you wish. The **Stop** button is for network use and allows for troubleshooting



A *PMPW Login Form* will appear requiring a Login Id and Password. This screen is controlled by Security and should

be setup so that each user enters with their personal ID and password. Setup instructions can be found on page 89.

If security has not been setup on your PMP type **'RS'** into the **Login Id** field. Click into the **Password** field or press the **Tab** key. Type **'RS'**. The password will appear as asterisks. Click **OK** or press **Enter**.

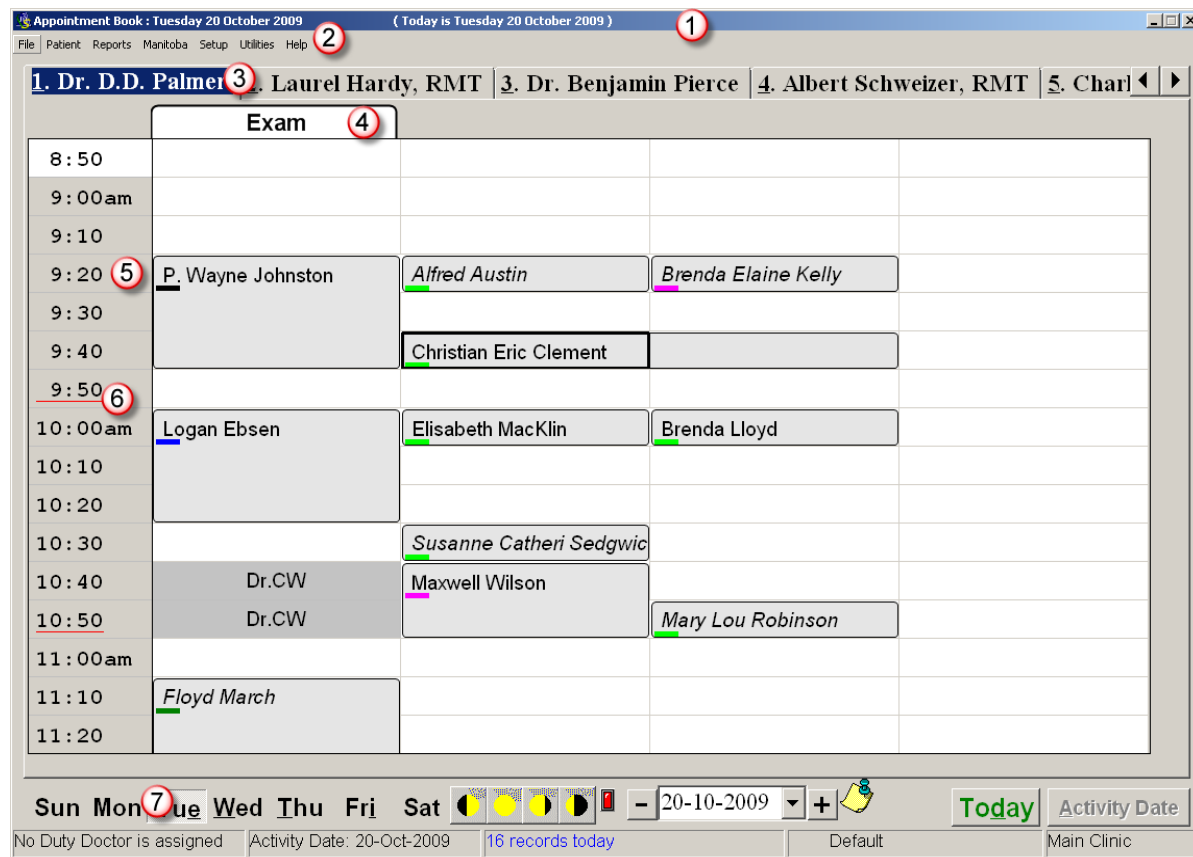


Main Appointment Screen Description

Main Screen Appointment Book

All patient activity can be done from the appointment book. Our easy to use appointment book allows you to add a new patient, make single or multiple appointments, and add, update and change patient information.

The Patient Management Program will accommodate up to 27 practitioners. You may wish to list your practitioners in a specific order or it may be that not all practitioners are in the office everyday. The features Appointment Book and Appointment Book Sets will allow you to customize the appearance of your PMP.



1 Title Bar
The title bar lists current information. The date on the left is the date of the appointment book displayed. The date in brackets is today's date. This information comes from your computer.

2 Pull Down Menus
Access the program through easy to use menus. Menu items with an arrow '▶' have a secondary menu.

3 Practitioner Tabs
Each practitioner has their own tab. Move through practitioner tabs by clicking onto their name on the tab or type the corresponding underlined number to view the appointment book for that practitioner.

4

Named Columns

Practitioners can create, assign, and share columns. Sharing columns will allow other practitioners to see when rooms are in use and eliminates overbooking.

5

Time Slots

Time slots are defaulted to 15 minute increments and the colour coding signifies valid appointment slots as set up in Doctor Hours. Time intervals of 5, 10, and 20 minutes are available and this option is chosen in Doctor Defaults. The number of columns is customizable by practitioner to represent the number of appointments the practitioner can book in each time interval.

6

Hidden Appointments

Time slots with a red underline indicate an invalid appointment. Clicking on the timeslot will provide details about the hidden appointment.

7

Days of the Week

Clicking on one of these buttons will cause PMP to change the Appointment Book to that day. The button will stay indented to show you the day of the week. These buttons are related to the week you are viewing on the appointment book.

The screenshot shows the 'Appointment Book' window for Tuesday, 20 October 2009. The top menu bar includes File, Patient, Reports, Manitoba, Setup, Utilities, and Help. Below the menu is a list of practitioners: 1. Dr. D.D. Palmer, 2. Laurel Hardy, RMT, 3. Dr. Benjamin Pierce, 4. Albert Schweizer, RMT, and 5. Charl. The main area is a grid with time slots on the left (8:50 to 11:20) and appointment slots on the right. Appointments are listed in a grid format, with some names like 'P. Wayne Johnston', 'Alfred Austin', 'Brenda Elaine Kelly', 'Christian Eric Clement', 'Logan Ebsen', 'Elisabeth MacKlin', 'Brenda Lloyd', 'Susanne Catheri Sedgwick', 'Maxwell Wilson', 'Mary Lou Robinson', and 'Floyd March'. Some appointment slots are highlighted with red circles (8, 9, 10, 11, 12, 13, 14, 15, 16). The bottom navigation bar shows the days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and a date selector set to 20-10-2009. It also includes buttons for 'Today', 'Activity Date', and 'Main Clinic'.

8

Vertical Appointments

Appointments can be booked either vertically or horizontally. Named columns book vertical appointments only.

9

Horizontal Appointments

A horizontal appointment will book to the right and may or may not scroll to additional timeslots depending upon your doctor default settings.

10

Shared Room Appointments

Named columns can be shared by practitioners. This allows practitioners using the same treatment rooms to check for availability and easily see when the room is in use by another practitioner.

The patient name is visible on the appointment book of the treating practitioner. Other practitioners sharing the room will see a visual reference that the room is booked. This is indicated by the grey shaded area where you see **Dr.CW** on the screen shot.

11

Suns

The four suns correspond with:

- Morning - 9 AM or your first appointment.
- Midday - 11 AM
- Afternoon - 2 PM
- Evening - 5 PM.

Clicking on any of the Suns will change the time to that part of the day.

12

The 'Blinking' Light

Colours are used to indicate overall appointment status of all patients for all practitioners.

- Green means that there are no late appointments.
- Yellow means at least one appointment is five minutes late.
- Blinking Red means that at least one appointment is 15 minutes late

Click on the light to manage late appointments or to turn the Blinking Light off.

13

Current Date / Appointment Book Date Selector

This shows the date that the Appointment Book is displaying. Click on the down arrow to select another date. Click onto the back or forward arrow once for every month you wish to move backward or forward. You can also click onto the month or year to produce a list of months or years. Click onto the day on the calendar to select that day for viewing on the screen.

14

Plus and Minus Buttons

Each click moves the date of the Appointment Book forward or backward by one week.

15

Post It Note

The Post It Note, once set up, will allow you to communicate with other staff members or leave yourself reminders. You can also set it up so that today's note appears when PMP is opened if a note has been created. This is set up in **Setup, Computer Defaults**.



Note: Notes are only visible when they have been created in the **Setup** menu.

16

Today Button

Clicking the Today button will bring the Appointment book back to today's date.

Moving Around the Appointment Book

Arrow Keys on the Keyboard

The arrow keys will move the cell pointer in the direction of the arrows. Holding an arrow key will cause the Appointment Book to scroll in that direction.

Page Up, Page Down on the Keyboard

These keys will cause the time to advance three hours forward or backward. It will not allow you to travel beyond the doctor's hours.

Wheel / Scroll Mouse

If you have a wheel mouse you can use the wheel to scroll up or down.

Hotkeys from the Appointment Book

The following keys affect the appointment within the cell pointer:

C	will mark an appointment Confirmed
A	will mark an appointment Arrived
M	will mark an appointment Missed
P	will mark an appointment Postponed
F10	will process activity for the selected appointment

The following keys are not dependent on a specific appointment:

F	will start the function search for a patient by First name
L	will start the function search for a patient by Last name
N	will start the function search for a patient by Number
1, 2, 3, etc	will move through the different tabs on the Appointment Book

Function Keys

F1	Help	
F2	Add an Appointment	<i>See page 22</i>
F3	Show our Day	<i>See page 24</i>
F4	Daily Summary Sheet for the displayed Doctor and Date	<i>See page 73</i>
F5	Show my Week	<i>See page 25</i>
F6	Edit Patient Information	<i>See page 47</i>
F7	Screen Saver will be activated if set up in the Control Panel	
F8	Login Form	<i>See page 90</i>
F9	Write Off from within Patient Activity	<i>See page 44</i>
F10	Process Activity for the selected Appointment	<i>See page 32</i>
F11	Default Activity from within Patient Activity	<i>See page 50</i>
F12	Process Activity by selecting a patient	<i>See page 35</i>

Right Click Menu

Right clicking the mouse on the appointment book brings up a menu with common functions.

Customizing PMP for Your Office

Creating Letterhead

Letterhead is created by each office or practitioner to be printed at the top of statements. It should show your clinic and practitioner names as well as practitioner registration numbers. Address, telephone and fax numbers, Email and website address should also be detailed.

Click the **File** menu, **WordProcessor**. Change the justification to centre using the centre justification icon.



Type the Clinic or Doctor's Name on the top line, Address, City, Postal Code, Phone, and Fax numbers on subsequent lines. See example below.

Dr. DD Palmer
Spinal Health Clinic
 5160 Explorer Drive, Suite 30,
 Winnipeg MB R2W 4T7
 Phone: 204 629-8211 Fax: 204 629-8214
 spinalhelath@chiropractic.on.ca

When the letterhead is complete click the **File** menu, **Save As**. Double click the Template folder. Click into the **Filename**: field and type the word **Letterhead** with the Doctor's initials, ie. **LetterheadDD**. Click **Save**. Your letterhead is now saved in the template directory. You may create as many letterheads as you choose. Letterheads must be named **Letterhead**[something].

Choose your letterhead as the Default Letterhead in Doctor Defaults. Click the **Setup** menu, **Doctor Defaults**. Choose a practitioner and click **Edit this Doctor's Defaults**. Click **Select a File to use** to the right of **Default Letterhead**. Click the appropriate letterhead and click **Open**. Click **Accept**. The chosen letterhead will automatically be selected for this practitioner when printing statements.

✓ **Hint:** If the letterhead you created is not available, check the WordProcessor to be sure it was saved as letterhead[something] in the Template folder.

The following items are found under the **Setup** menu.

Clinic Defaults

The Clinic Default screen contains the name of your clinic or office and complete address. The default city and area code will populate new patient files reducing the amount of input required.

- **Partnership** is for legal business partnerships only. In most cases you should not have a checkmark. If in doubt contact the support line.
- **Use Login** is required for security in PMP.
- **Total Payments on Statements** groups together payments on statements even when it is distributed to multiple practitioners in the patient record.
- **Stop Reports from auto closing** will allow report choice to remain open to allow for multi-practitioner printing of reports..

- **Show Unit buttons on editing Appointments** will allow vertical and horizontal unit buttons to appear saving time when scheduling appointments.
- **Show Initials on Horizontal Appointments** will allow patient initials to populate all cells for multiple unit appointments so that it is more noticeable that an appointment is scheduled into a time slot.
- **Default "From" date on Statements** will start printed statements from the date selected.
- **Popup comments to pop automatically on** indicate where pop ups are designed to appear. Patient pop ups are information boxes that appear on a patient file where and when you choose, stating information you have input and may require about this patient or appointment. Patient pop ups are created in Patient Information on the Pop Ups tab. Locations where pop ups designed to appear are chosen here.

Choose which actions will cause pop ups to appear by check marking items.

Popup comments to pop automatically on

☒ Edit Appointment Information; Arrived

☐ Make an Appointment in this time slot

☐ F2 Add an Appointment

☒ Patient Activity

- **Edit Appointment Information.** This screen appears after you click on a booked appointment on the appointment book.

Edit Appointment Information

Patient Name: Lauren James

Type of Appointment: Exam

Location: Main Clinic

Comment:

Date / Time: 11-Nov-2009, 06:15 AM

Units: 3

☒ Vertical ☐ Horizontal

Status: ☐ Unconfirmed ☐ Confirmed ☐ Arrived ☐ Done ☐ Rescheduled ☐ Postponed ☐ Missed ☐ Cancelled

Copy Appt.

Press F10 for Activity or F6 for Patient Info

Popl

Patient sees Dr. Palmer only

Edit Pop Ups OK

- **Arrived.** The popup will also appear when you arrive a patient on the Appointment Book using the hotkey of **A**.

Mary Brown

- **Make an Appointment in this Time Slot.** This screen is available when clicking onto an empty time slot from the appointment book screen.

Make an appointment in this Time Slot

Daniel David Palmer, DC #4444

Pat No.: 1434

First Name: Lauren

Last Name: James

Date / Time: 11-Nov-2009, 09:45 AM

Location: Main Clinic

Units: 3

☒ Vertical ☐ Horizontal

Appointment Status: ☐ Unconfirmed ☐ Confirmed ☐ Arrived

Add New Patient

Cancel

Finished

Popl

Patient sees Dr. Palmer only

Edit Pop Ups OK

- **F2 Add an Appointment.** Whenever accessing the **F2 Add an Appointment** grid.

Add an Appointment - Elizabeth James - F10

Current Appointment: Daniel David Palmer, DC #4444

Location: Main Clinic

Type of Appointment: Exam

Comment:

Date / Time: 11-Nov-2009, 09:45 AM

Units: 3

☒ Vertical ☐ Horizontal

Appointment Status: ☐ Unconfirmed ☐ Confirmed ☐ Arrived

Add New Patient

Cancel

Finished

Popl

Patient sees Dr. Palmer only

Edit Pop Ups OK

- **Patient Activity.** Before processing activity.

Doctor Defaults

The Doctor Defaults screen allows you to personalize the PMP for each Practitioner. Click into each box to add or edit information. Some fields cannot be edited due to security.

The edit doctor default allows you to choose the doctor's name on the appointment book tab and whether the AR totals appear on the Summary Sheets. Determine whether you would like the birthday song to play and choose the default appointment type for each practitioner.

Appointments that exceed the time slot offers options as to how to display the appointments within the columns.

- *Will stay fixed* will display extra columns warning you when appointments booked in that time slot exceed the number of units available for the current practitioner. There is a maximum of 9 columns. If the number of units exceeds 9 a sad face icon appears as a warning. Clicking the sad face icon shows the list of hidden appointments.
- *Will wrap* allows appointments that exceed the timeslot to move to the next time interval.
- *Will wrap and hide* will wrap as the choice above but it also hides all appointments that are missed, rescheduled, cancelled, and postponed.



 **Note:** Named columns will automatically hide invalid appointments.

Appointment Book Configuration will allow practitioners to specify personalized settings.

- *Time Slot Interval* offers 5, 10, 15, and 20 minute intervals.
- *Columns Across* offers 1 – 9 columns.
- *Available Columns* are the named columns available for use. These are created under the Setup menu, Named Columns.
- *Your Named Columns* are the columns that you would like to appear on this practitioner's appointment book. Named columns accept vertical appointment booking only and can be shared by practitioners. This allows practitioners sharing treatment rooms to check availability and see when the room is in use by others.

Computer Defaults

This area is utilized if the user would like different information on this computer than may be available at another networked computer. You can change the screen size and print receipts with an alternate address rather than the Clinic Default address. Cell shading is defined and you can also choose a different Appointment Book Set. The options on the Computer Default screen are used for this computer only. If you are running PMP networked each computer can assign different options.

Screen Size

The PMP screen resolution can be changed so that you decide how PMP will appear on your desktop. Networked offices will choose screen resolution for each computer running PMP.

Choose the screen resolution by clicking the radio button beside your choice under Screen Size. The screen will change each time you click a different radio button allowing you to choose the screen size you prefer.

Note that *grayed out* screen sizes are not available for this monitor although you may be able to increase these options by changing your screen settings in Display Properties.

To temporarily change the screen size from the main appointment book:

- Press the **Ctrl** and **up arrow** keys together when on the main appointment book to enlarge
- Press the **Ctrl** and **down arrow** keys together when on the main appointment book to shrink.

This temporary feature is also available on the right click menu.

Appointment Shading

Appointment cells can be shaded to various degrees of grey to signify their meaning on the schedule.

- **Appointment Cell shade** refers to booked appointments. This makes viewing horizontal appointments that wrap easier to distinguish. Adjust the lever to the desired setting.
- **Unavailable Shared Column Cell shade** refers to shared columns where another practitioner has a patient booked and a timeslot is not available. This cell is also populated with the doctor code of the practitioner who is using this room. Adjust the lever to the desired setting.
- **Extra Column Cell shade** refers to temporary columns that are added to accommodate appointments that exceed the timeslot when wrapping is not turned on. This differentiates these columns so that over-booking does not occur by inadvertently booking into the Extra column.

Other Setup Menu Options

Appointment Books

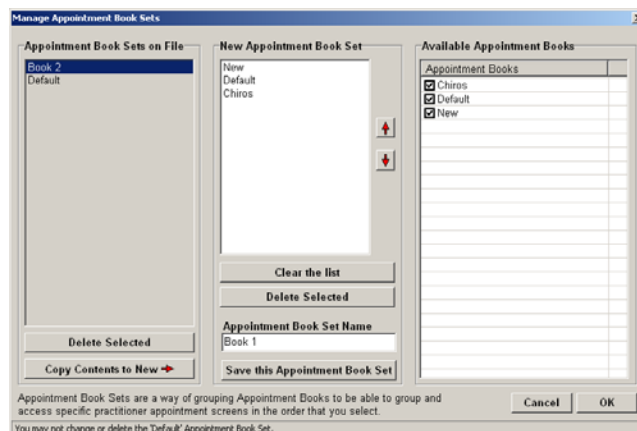
The Patient Management Program will accommodate up to 27 practitioners. You may wish to list your practitioners in a specific order or it may be that not all practitioners are in the office everyday. The features Appointment Book and Appointment Book Sets will allow you to customize the appearance of your PMP.

When creating an Appointment Book, choose the practitioners to be included by clicking the box to the left of the

practitioners' name in the right hand column. The names will appear in the middle column in the field below **New Appointment Book**. You can change the order of the practitioners by clicking the red arrows. Type a name for the Appointment Book and click **Save**. The named Appointment Book will appear in the field below **Appointment Books on File**. Click **OK**.

Appointment Book Sets

This feature is used to group together Appointment Books that you have created. For instance you may have an Appointment Book Set titled Practitioners which contains the separate appointment books of Chiropractors, Massage Therapists and Other Practitioners. Another option for an appointment book set could be the days of the week. Appointment Book Sets are also useful if you have more than one location using the same PMP. Pressing the space bar when on the main appointment book screen moves you between the different appointment books in the set.

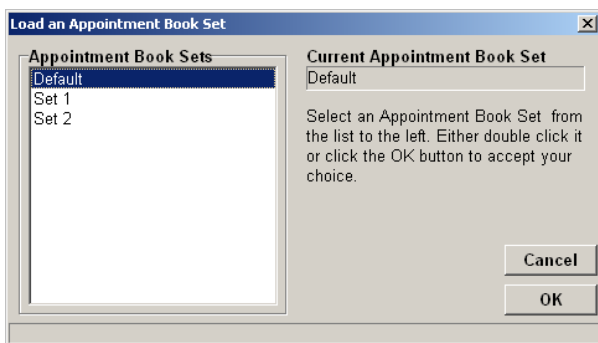


The Appointment Book Sets area functions similarly to the Appointment Books area. To create a set click the box to the left of each of the available Appointment Books on the right. The books will appear in the center of the screen in the field below New Appointment Book Set. You can change the order of the set by clicking the up or down red arrows. Name the Appointment Book. Once all the information is correct click **Save this Appointment Book Set**. The named Set will appear in the field below Appointment Book Sets on File. Click **OK**.

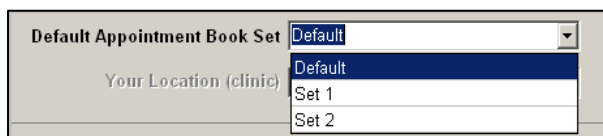
Loading Appointment Book Sets

There are two ways to load Appointment Book Sets:

- **For Today Only.** A specific Appointment Book Set will need to be loaded each time you open PMP. Click **Set Up, Appointment Book Sets, Load an Appointment Book Set**. A pop up window will appear entitled **Load an Appointment Book Set**. Click the appropriate book. Click **OK**.



- **Every Time.** The chosen set will appear every time you open PMP. Click **Setup, Computer Defaults**. Click the down arrow to the right of Default Appointment Book Set. Select the appropriate set for this computer. **Note:** Close and reopen PMP to view this change.



Appointment Colours

This area is linked to the appointment book and defines which colour represents which type of appointment. The colours chosen appear in the bottom left hand corner of booked appointments on the appointment book.

PMP offers eight colours. Determine which appointment colour is to be associated with which Appointment Type. Define the Screen Text which is a short form of the appointment name. It is used on reports regarding appointment colours.

Colour Nu...	Appointment Type	Screen Text
1	Initial Visit	IV
2	Reassessment	REX
3	Report of Findings	ROF
4	Progress Exam	Prog. Exam
5	Adjustment	Adj
6	IFC	IFC
7	Massage Therapy	MT60
8	Consultation	Cons

Appointment Comments

Appointment Comments are used to create a pick list of standardized comments for use when setting up patient appointments.

Rooms can be booked on a regular basis for particular patients and notes such as Room 1 or 2 only will assist in increasing patient satisfaction. These comments may also be used for messages between staff. For example, if a patient says he or she will pay next visit, when booking the next appointment the staff member adds the word 'Collect' to the comment area.

Code	Description
CB	Call to Book
COLL	Collect Account
EXAM	Exam Next Time
LM	Left Message
REM	Call to Remind

Appointment Types

This area is linked to the patient information and appointment book windows and allows you to preset standard appointment types and assign a fixed number of time units to each type. The descriptor used for each appointment type may be a maximum of 15 characters.

Description	Units
Adjustment	1
Consultation	3
IFC	1
Initial Visit	6
Massage Therapy	4
Progress Exam	3
Reassessment	3
Report of Findings	3

Bill/To Employers

The Bill/To Employers table enables you to build a database of employers and insurance companies. The form records the company code which you assign, company name, contact name, phone, and fax numbers, e-mail address, address, city, province/state, country, postal code and, where applicable, account number.

Code	Company	Contact	Phone	Ext	Fax	Email
ADJ1	Adjusters Canada	Bill Williams	(905)454-8955		(905)454-8888	
BLCR	Blue Cross	Shem Blue	(416)636-5955	232	(416)636-5959	
CAA	Caa Insurance Company	May Smith	(416)111-2222		(416)111-2333	
CG	Canadian General Insurance	Joe Green	(416)288-5216	30	(416)288-1088	green@
LBM	Liberty Mutual	Cathy Lang	(905)639-6221		(905)639-9453	
	No Company		() - ()		() - ()	
HAL	The Halifax Insurance Company	John Brown	(416)440-1000		(416)440-0630	
VET	Veterans Affairs Canada	Jeff Bold	(800)387-0919		() - ()	
ZUR	Zurich Canada	Mike Gold	(807)346-2252		(807)346-2259	

City Codes

The City Codes form is linked to patient information and allows you to add the names of cities in your surrounding area where your patients live and work. This helps to speed up the input of information into patient records and provides uniform phrasing and spelling.

City	Province
Arborg	Manitoba
Beausejour	Manitoba
Bowman	Manitoba
Brandon	Manitoba
Cartier	Manitoba
Dugald	Manitoba
East St. Paul	Manitoba
Fannystelle	Manitoba
Hilbry	Manitoba
Hodgson	Manitoba

Doctors Hours

This area allows you to set office hours for each doctor or practitioner. Choose the practitioner and click **Edit this Doctors** hours. Position your mouse over a time slot and hold down the left mouse button. Drag your mouse to the ending time slot and release the button. Click either **Set to the Doctor is In** or **Set to the Doctor is Out**. Click **Accept** when complete.

From here you set the Doctor's Hours. The Doctor can be in any day from 5:00 AM to Midnight. The time the Doctor is in is set in 15 minute intervals. From here you can both change the doctors schedule. Click on a Cell to highlight a time slot or Click and Drag to highlight a range of time slots.

To make your selection into Time slots where the Doctor is present, Press the "Set to the Doctor is In" button.

To remove Time slots, Press the "Set to the Doctor is Out" button.

Blue means the Doctor is in.

Fee Classes

Fee Classes are used to determine which fees are treated as initial visits, re-exams, x-rays, and subsequent visits on summary sheets. Fee classes are linked to the treatment part of fee schedule.

All New Patient activity should be copied into the initial visit code area of Fee Classes in order to appear correctly on summary sheets. These items will appear as new patient visits on the last page of your daily summary sheet if the patient does not have any previous transactions on their Account Activity screen. Previous activity in the patient file would mark the patient as a re-exam on the daily summary sheet.

When fee schedule items are selected as Initial Visits the MH code becomes V103 which the PMP program recognizes as a new patient visit, for this reason items that have a Manitoba Health fee code of 8506 attached will lose the ability to bill MH for this visit. MH pays for chiropractic adjustments only and therefore if you wish to bill MH for a new patient adjustment you will need to bill this activity separately as the 8506 MH code will not be present on new patient visits selected in fee classes.

MPI and WCB initial visit and x-ray codes must also be selected in fee classes to ensure proper placement on billing invoices.

Original Lists
Initial Visit Codes

New Lists (current)
Initial Visit Codes

Fee Schedule (Treatments)

Code as Desk

- 1ST First Visit Treatment Fee
- ACU Acupuncture
- CON Consultation/Examination
- EHC1 Extended Health Care
- EHC2 Extended Health Care
- HC House Call Emergency
- MAS1 Massage 1 hour
- MAS2 Massage 1/2 hour
- MVA Motor Vehicle Accident
- RF Report of Findings
- SUB Subsequent Visit
- XCS X-Ray Cervical Spine
- XFS X-Ray Full Series
- XFSS X-Ray Full Series
- XLS X-Ray Lumbar Spine
- XTS X-Ray Thoracic Spine


This form is used to determine which fees are treated as Initial Visits or Xray Visits on the Summary Sheets. (All other treatments are considered Subsequent Visits)

Note to MB: Initial and Xray must be marked here, to bill correctly.

Fee Schedule

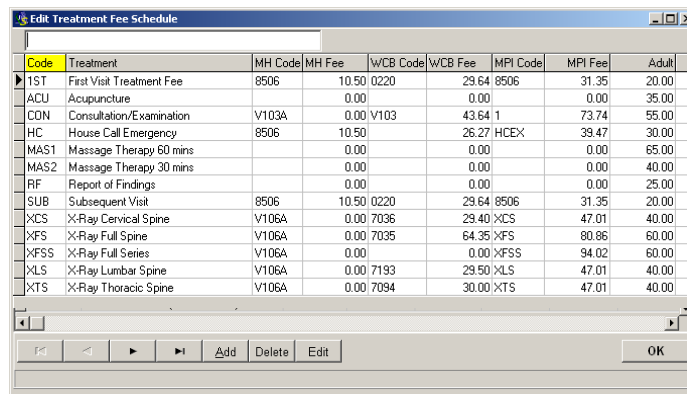
The fee schedule is broken up into three parts;

- Treatment: Fees for services rendered are stored here.
- Other: All other items such as Gift Certificates, Transfers, Refunds, etc.
- Inventory: All tangible items that are sold.

 **Note:** Fee Schedule codes must be unique. You cannot use the same code for more than one item.

Treatment

The Fee Schedule for Treatment allows you to create and edit treatment fees for your office regarding billings to the patient and WCB. To add a treatment click **Add**, then **Form**. Type a code to denote the treatment you are inputting. Press the **Tab** key. Type a description of the treatment. Press **Tab** and type the amount you wish to charge for this billing for each patient category. Next to the **MH**, **MPI**, and **WCB Codes** and **MH**, **MPI**, and **WCB Fees** type the corresponding codes and fees.



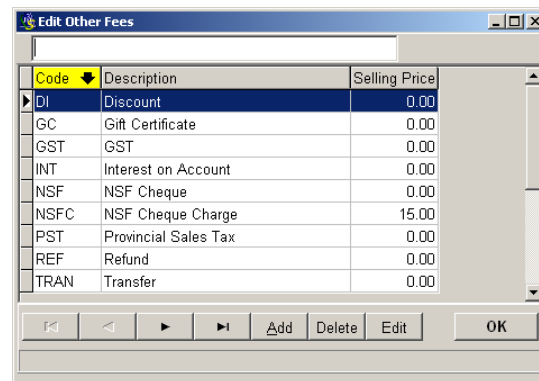
Code	Treatment	MH Code	MH Fee	WCB Code	WCB Fee	MPI Code	MPI Fee	Adult
1ST	First Visit Treatment Fee	8506	10.50	0220	29.64	8506	31.35	20.00
ACU	Acupuncture		0.00		0.00		0.00	35.00
CON	Consultation/Examination	V103A	0.00	V103	43.64	1	73.74	55.00
HC	House Call Emergency	8506	10.50		26.27	HCEX	39.47	30.00
MAS1	Massage Therapy 60 mins		0.00		0.00		0.00	65.00
MAS2	Massage Therapy 30 mins		0.00		0.00		0.00	40.00
RF	Report of Findings		0.00		0.00		0.00	25.00
SUB	Subsequent Visit	8506	10.50	0220	29.64	8506	31.35	20.00
XCS	X-Ray Cervical Spine	V106A	0.00	7036	29.40	XCS	47.01	40.00
XFS	X-Ray Full Spine	V106A	0.00	7035	64.35	XFS	80.86	60.00
XFSS	X-Ray Full Series	V106A	0.00		0.00	XFSS	94.02	60.00
XLS	X-Ray Lumbar Spine	V106A	0.00	7193	29.50	XLS	47.01	40.00
XTS	X-Ray Thoracic Spine	V106A	0.00	7094	30.00	XTS	47.01	40.00

To edit a treatment click the treatment in the list and click **Edit**. Make edits by clicking into the appropriate box and making the changes. Click **OK**.

Other

The table includes the Code, Description, and Selling Price. Items that are not a treatment or Inventory item should be placed here. For details on processing various kinds of activity such as Discounts, Gift Certificates, Refunds and Transfers

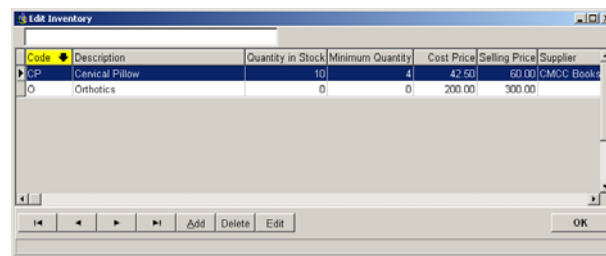
➔ See pages 36.




Code	Description	Selling Price
DI	Discount	0.00
GC	Gift Certificate	0.00
GST	GST	0.00
INT	Interest on Account	0.00
NSF	NSF Cheque	0.00
NSFC	NSF Cheque Charge	15.00
PST	Provincial Sales Tax	0.00
REF	Refund	0.00
TRAN	Transfer	0.00

Inventory

The fee schedule for inventory allows you to track products you sell or hold in inventory. The form records the product code, description, quantity in stock, minimum stock quantity, cost price, selling price, supplier, and applicable taxes. **Note:** Taxes are input as the percentage amount applicable. Remember to increase the quantity in stock when you receive a supply order.



Code	Description	Quantity in Stock	Minimum Quantity	Cost Price	Selling Price	Supplier
CP	Cervical Pillow	10	4	42.50	60.00	CMCC Book
O	Orthotics	0	0	200.00	300.00	

 **Note:** Fee Schedule codes must be unique. You cannot use the same code for more than one item.

Flags

Flags will allow you to identify particular patients based on criteria that you determine. It is a way of grouping patients. You may create up to 36 flags that are distinctive to your office.

An example would be a 1 to identify the primary contact member of the family for a mailing list.

Flags	Description
0	
1	Mailing List
2	MVA Patient
3	
4	
5	
6	
7	
8	
9	
A	Announcement-moving
B	Call Day Before
C	
D	
E	
F	Promotional Flyer
G	
H	Health Care Class

Flags	Description
I	Income Tax Receipts
J	
K	
L	
M	Massage Patient
N	
O	Orthotics
P	Pregnant
Q	
R	
S	Call Same Day
T	
U	
V	
W	
X	
Y	
Z	

Named Columns

Named columns allows practitioners to define treatment rooms or treatment types. You can name as many columns as you like. Named columns accept vertical appointment booking only. Named columns can be shared by practitioners. This allows practitioners sharing treatment rooms to easily see availability and when the room is in use by another practitioner.

The addition of named columns allows practitioners to define treatment rooms or treatment types. You can name as many of your columns as you like. Named columns accept vertical appointment booking only. Named columns can be shared by practitioners. This allows practitioners sharing treatment rooms to easily see availability and when the room is in use by another practitioner.

Name	Date Created/Comments
Exam	23-Sep-2009
Exam2	9-Oct-2009
Exercise	
Massage	
Room 1	
Room 2	
Room 3	
Room 4	

Name	Date Created/Date Deleted/Comments

Notes

Notes are a way to provide reminders and inter-office communication. You can remind yourself or others to order inventory items, recall patients, provide reports to bookkeeper etc.

Date	Description	Comment
27-Jun-2007	Reminder	Call
03-Jul-2007	Dr. Notes	Dr. needs to leave early.
16-Jul-2007	Close	Closed for Conference

Other Comments

The purpose of the Other Comments form is to provide a pick list of standardized comments for use when printing a patient appointment calendar. Comments such as '24 hour notice required for all rescheduled appointments' or 'Reminder - your progress evaluation is a 30 minute appointment, so please plan accordingly', may be used.

Code	Description	Comment
NP	New Patients	New Patients are always welcome!
PAD	Patient Appreciation	June 23rd, is Patient Appreciation Day!
REM	Reminder	All rescheduled appointments require 24 hour notice.

Patient Categories

Your office may have different fees for adults, seniors and students. Assigning Patient Categories will allow you to bill different fees to different patients automatically. To create new categories click **Setup, Patient Categories** and click onto an unused category. Click **Edit**, type the appropriate change and click **Save**. To update your changes in the category area you must close and reopen the program. A maximum of 18 categories can be created.

Nu...	Patient Category
1	Adult
2	Senior
3	Child
4	No Charge
5	Family member
6	Compassionate
7	
8	
9	

✓ **Hint:** Once complete, do not delete or change the order of the categories. They are assigned to your patients based on the order in the list and deleting or changing the order of the categories will change your patients' personal information.

Patient Comments

The Patient Comments form is an area that provides a pick list of standardized comments for use within the patient file. Comments may include account details, special patient instructions or other personal information. You may add individual comments within the patient files that are unique to that patient if the pick list comments do not provide enough information.

Code	Description	Comment
R1	Prefers Room 1	Patient Prefers Room 1
RCDB	Reminder Day Before	Patient requires a reminder call the day before.
RCSD	Reminder Same Day	Patient requires a reminder call same day.

Payment Types

Payment Types lists all types of payments accepted in your office. It is used for selecting the payment type while posting activity. Payment type can also be set up as a default in the Patient Information Personal tab.

Description	Short Description
American Express	AMEX
Cash	CASH
Cheque	CHEK
Debit Card	DBT
Gift Certificate	GIFT
Insurance Cheque	IC
MasterCard	M.C.
Transfer	TRAN
Visa	VISA

Phone Number Types

This area is linked to the patient information window and allows you to set a number of telephone fields so that you may capture several telephone numbers from each patient. Telephone numbers may include work, home, pager, cellular phone, cottage, and fax.

Nu...	Description
1	N/A
2	Cell
3	Pager
4	Work
5	Fax
6	Cottage
7	Mom's work
8	Emergency Contact
9	Dad's work

Province/State Codes

The Province Codes Form is linked to patient information and allows you to add the names of provinces or states in your surrounding area, where your patients live and work. This helps to speed up the input of information into patient records and provides for uniform phrasing and spelling.

Province	Description	Country
AB	Alberta	Canada
BC	British Columbia	Canada
MB	Manitoba	Canada
NB	New Brunswick	Canada
NY	New York	U.S.A.
NF	Newfoundland	Canada
NT	Northwest Territories	Canada
NS	Nova Scotia	Canada
ON	Ontario	Canada
PE	Prince Edward Island	Canada
QC	Quebec	Canada
SK	Saskatchewan	Canada
YT	Yukon	Canada

Referrals

If your office tracks referrals, this form will be very useful to you as it will capture referral information from industry as well as individuals. The Edit Referrals form records the code assigned, the referral name, and contact details.

Code	Name	Contact
S	Staff	
WP	White Pages Ad	
YP	Yellow Pages Ad	



Note: This field in patient information is case and punctuation sensitive. It is important that you set-up the pick list for referrals if you wish to be able to accurately produce the referral activity report.

Statement Comments

The purpose of Statement Comments is to provide additional information, reminders or personalized notes on patient account statements. Comments may wish them 'Happy Holidays', remind them about 'Spinal Health Week', promote new products, or inform of current interest rate charges on accounts past due.

Code	Description	Comment
PAY	Prompt Payment	Prompt Payment is appreciated!
Prac	Practitioner Info	Dr. Daniel D. Palmer, Reg # 1234

Suppliers

The Suppliers form enables you to build a database of your suppliers. The Edit Suppliers table records the company code which you assign, company name, contact name, phone and fax numbers, e-mail address, address, city, province/state, country, postal code and account number. Some offices use this as a phone directory of frequently called numbers.

Code	Name	Contact	Phone Number
CMCC	CMCC Bookstore		(800) 260-6940
OCA	Ontario Chiropractic Assoc.		(877) 327-2273
PMP	PMP Support		(800) 561-7361

Vacation/Holiday/Time Off

These areas allow you to set the vacation and time off schedules for each individual practitioner and holidays for the entire office/clinic. Office holidays should be set up first, then vacations.

To create Vacation and Holidays click the specified date or click and drag a range of dates to highlight. Click the Declare Holiday or Declare Vacation button. Holidays will require you to type in a name to activate the function for the holiday.

Vacations will appear on the appointment book as green times.

Holidays will appear on the appointment book as blue times.

Edit Doctors Time Off for other appointments and half days. Access to this function is located in the **Setup** menu, **Vacation / Holiday/ Time Off** and on the right click menu. Time off will book 15 minute increments only. Practitioners with time intervals set for 10 or 20 minute increments will have time off start 5 minutes later.

Creating time off is easy, click onto a 'Start' time on the grid. Click on an 'End' time on the grid. Click **Book From-To off** to book off the times in between. Add a Comment. Click **OK**.

Once you have setup up Doctors Time Off it will be indicated on the **Appointment Book**, **F2 – Add an Appt, Edit Appointment**, and **Multiple Appointment Detail** screens as a red strike through on the time(s).

Appointments

Appointment types are created under the Setup menu. Each Appointment Type, when set up correctly with an assigned number of units, will book the required amount of time on your appointment book. Up to eight appointment types can have a related colour signifying the appointment type at a glance. Colours are assigned under the **Setup** menu, **Appointment Colours**. → **See page 12.**

Book an Appointment by Clicking into a Timeslot

When you click on the appointment book a screen appears that allows you to book an appointment into the selected time slot.

Choose your search criteria and click onto a button under **Select a Patient By**. The **Other** button offers alternate ways of searching such as postal code or phone number. You can also add an appointment for a new patient by clicking onto the **Add New Patient** button and adding a new patient.

Select the patient by clicking onto the **Last name**, **Number**, or **First name** button and typing the name / number of the patient. Double click or press **Enter** on the highlighted patient.

Change the type of appointment by clicking the down arrow under **Type of Appointment** and choosing another appointment type from the list. Units are the number of columns this appointment will fill. Numbered buttons above and beside the units will book the unit number you click on, either horizontally or vertically. Alternately you can type in the unit number and select **Horizontal** or **Vertical**. Click **Finished**.

Note: The Unit buttons across the top and down the side is an option that is selected under the **Setup** menu, **Clinic Defaults**.

show Unit buttons on editing Appointments ☒

7:45				
8:00am	Amy Love	Judith Lynnd		
8:15				
8:30				
8:45				
9:00am				

F2 Appointment Grid

This method of adding an appointment does not use the appointment book directly, therefore you must supply all the information about the appointment. You can also book multiple appointments and this is the fastest way to add several appointments.

The **F2** screen is broken up into the following sections:

- *Current Appointment* shows the details for the appointment we are booking.
- The *Time Grid* shows an overview of the day's schedule. Numbers that appear in the grid boxes represent the number of columns already in use for the specified time interval.
- *List of Appointments* and *Doctor tabs* at the bottom show the appointments currently being scheduled and an appointment book mini view. Scroll the appointment book screen to move to times and click onto the screen to book appointments.
- *Patient Information* on the right is a summary of information that may be required for scheduling purposes.

To create one appointment only click the appropriate date on the calendar. Choose the *Type of Appointment* and the units for the appointment with *horizontal* or *vertical* unit buttons. The unit buttons across and down is an option that is selected under the **Setup** menu, **Clinic Defaults**. Pick the *Room* if appropriate. Remember that rooms will only book vertical appointments.

Note: Practitioners utilizing 5 minute interval times should schedule **F2** appointments using the mini view at the bottom as 5 minute slots are not visible on the grid.

To book the time of the appointment choose to either book by clicking onto a time in the *Time Grid* area or by clicking onto the *mini appointment view*. Alter any other areas that are required such as Doctor for this Appointment, Status, Comment. Click **Finish**.

To create multiple appointments follow the above instructions but do not click **Finish**. Click **Add Another Appointment** after you have successfully entered the details for the first appointment. The date automatically advances to the next day. Click the next appointment date on the calendar and then the appropriate time. Continue this process until you have booked all required appointments. You may print an appointment List or Calendar from this screen if you wish. Click **Finish** when you have completed all appointments.

Appointment Booking after Posting Activity

When a patient does not have another appointment booked and you have completed posting their activity from the appointment screen, you will be taken to their Appointment tab in Patient Information. You can click onto the buttons **Add an app, same time next Week** or **Same time next Month (28 days)** to book for that time range. If the appointment does not meet booking criteria you will see a mini view of the appointment book alerting you to the fact that there is a scheduling problem. Clicking onto a valid timeslot allows you to book the required appointment.

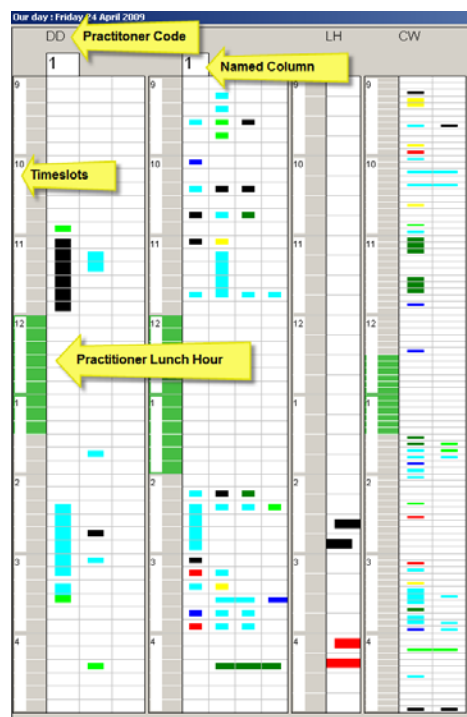
No. of Visits	First Visit	Last Visit	Next Visit Date and Time	Status
19	08-Nov-1997	12-Oct-2006	<input type="text"/>	<input type="text"/>
		<input type="button" value="Clear Date"/>		
<input type="button" value="Add an appointment"/>		<input type="button" value="Add an app, Same time next Week"/>	<input type="button" value="Book Multiple Appointments"/>	<input type="button" value="Print Calendar"/>
<input type="button" value="Same time next Month (28 days)"/>				

The **Add an appointment** button will take you into the F2 Appointment Grid.

If you choose to click **Continue** from the appointment tab you will be returned to the appointment book screen where you can use the Make an appointment in this Time Slot screen to book another appointment. The patient last posted will be selected as the patient to book for the next appointment.

F3 Show Our Day

Pressing **F3** will show the full daily schedule for all practitioners listed on the appointment book for whichever day you are viewing. This is helpful when looking for an available timeslot or trying to co-ordinate appointments.



Coloured boxes show times where scheduled appointments are booked.

Clicking onto a specified cell will open the mini appointment book view. Here you can book, edit, or view appointments.

John McJannet - Friday, April 24, 2009

Exercise			
2:00pm			
2:10	Lucille Rylott	Graham Godfrey	Heather Leonard
2:20	Ian Nelson	Helen Smith	Peter Pridham
2:30		Helen Porter	
2:40			
2:50			

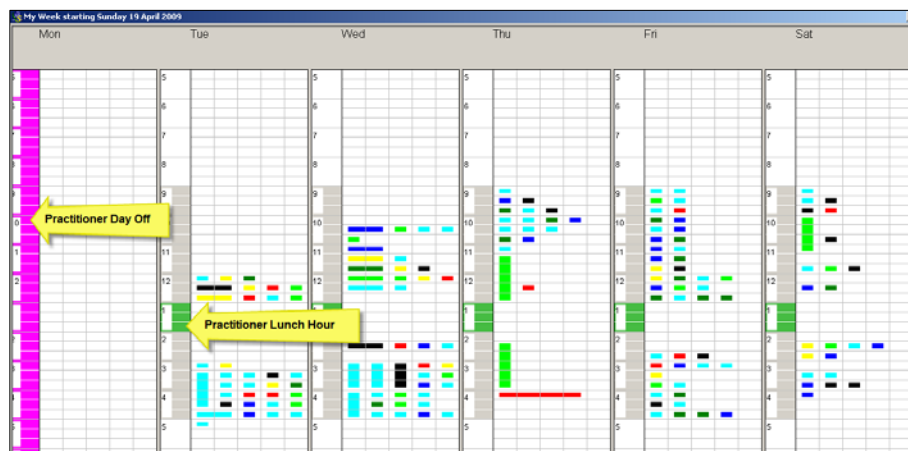
OK

Note: If any of your Practitioners are utilizing 5 minute intervals the screen view will show 9:00 am – 5:00 pm only due to space requirements. Other timeslots can be viewed by scrolling in the mini view screen by clicking onto a timeslot. All other intervals will show all office hours.

F5 Show My Week

The **F5** function will show the week at a glance for one practitioner for the week your calendar is on when pressing F5. This is helpful when looking for an available timeslot.

Coloured boxes show times and columns in use. Clicking onto a specified cell will invoke a 'slice' of the appointment book to open at the specified timeslot. Here you can book, edit, or view appointments in a similar manner to that in F3.




Appointment Status

The appointment status will let you know if a patient is expected, arrived, completed, rescheduled or has cancelled their appointment based upon the colour and font of the patient name on the appointment book. Some hotkeys are offered to change the status of appointments. To use hotkeys position the cell pointer (black box) on the patient that you wish to change the status of by using the arrow keys on your keyboard.

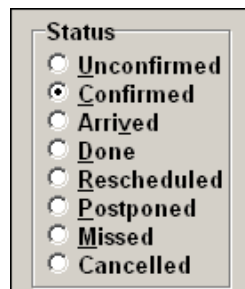
- **Arrived** An 'Arrived' appointment is blue. To 'Arrive' a patient simply press the **A** key.
- **Missed** 'Missed' appointments are red. When a patient has missed an appointment, press the **M** key.
- **Unconfirmed** An 'Unconfirmed' appointment is italicized. It does not have a hotkey. Unconfirmed appointments require reminder calls.
- **Confirmed** 'Confirmed' appointments are black. Change the status of an 'Unconfirmed' appointment to 'Confirmed' by pressing the **C** key.

- **Rescheduled** A 'Rescheduled' appointment has a red underline. It has no hotkey.
- **Postponed** 'Postponed' appointments are italics with a black strikeout. The hotkey is the **P** key. Postponing an appointment will add the patient to the Past Due Recall list.
- **Cancelled** A 'Cancelled' appointment are italics with a red strikeout. There is no hotkey. 'Cancelled' will add the patient to the Long Term Recall List.
- **Done** When you have finished processing a patient the appointment status automatically changes to 'Done'.

At any time throughout the day you can see exactly what the status is for each and every patient on your appointment book.

 **Note:** Names within a yellow cell indicate patients who are at least 5 minutes late.

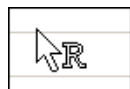
To change the appointment status on the appointment book, use the hotkeys where applicable by positioning the cell pointer on the patient name and typing the hotkey associated with the correct status. The cell pointer has a black border. Move the cell pointer by using the arrow keys on the keyboard. To change a status that does not have an associated hotkey click onto the patient name from the appointment book screen and choose the status of choice from the Edit Appointment Information screen. Click **Finish**.



Rescheduling Appointments

Within the same day. Appointments that are being rescheduled within the same day can be 'dragged' to alternate times. Position your mouse over the patient being rescheduled. Press and hold the left button and drag the mouse to the new time slot. When you are positioned over the new slot, release the mouse button. You can also use the scroll button on your mouse to drag appointments to time slots not visible on the screen.

To another date. Rescheduling an appointment requires that another appointment be made before the 'reschedule' process is complete. For this reason you will see a capital **R** attached to your mouse after choosing **Reschedule** from the Edit Appointment Information screen.

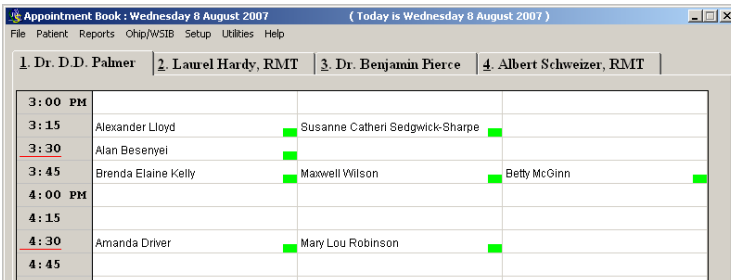


Click onto another time slot where you can use the Make an appointment in this Time Slot screen to book another appointment. The pre-selected name will be the patient you are rescheduling.

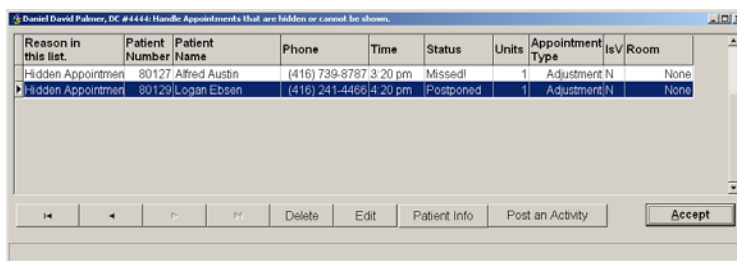
Hide Invalid Appointment

This option offers you the ability to 'hide' invalid appointments (Rescheduled, Cancelled, Postponed, and Missed) so that the timeslot is available for additional valid appointments.

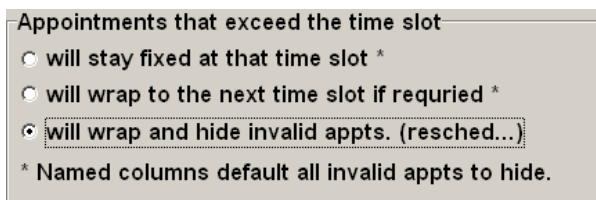
When the option is turned on (details below) and an invalid appointment exists in a timeslot the time will be seen with a red underline.



Click the timeslot to see the list of hidden appointments. At this point you can **Delete**, **Edit**, access **Patient Information** or **Post an Activity** for the highlighted patient. Click **Accept** to return to the appointment book.



To turn on the Hide feature go to the **Setup** menu, **Doctor Defaults**. Choose '**will wrap and hide invalid appts. (resched...)**'.



Invalid appointments will automatically hide when a practitioner has a named columns assigned to their appointment book.

This option is chosen by practitioner and therefore the default will need to be set for each person.



Note: Invalid appointments do not appear in the **F2 - Add an Appt** screen. Only *Confirmed* and *Unconfirmed* appointments are included in the visible timeslot number.

Multiple Appointment Booking

Multiple appointments will not book into Named Columns. They are scheduled by 15 minute intervals only. Practitioners utilizing 10 or 20 minute intervals will have appointments appear in the earlier timeslot that is closest to the 15 minute time chosen.

The ability to create multiple appointments is available from within Patient Information on the Appointments tab. Click **Book Multiple Appointments**.

Choose the doctor that you wish the appointments to be booked with. The Doctor of Record will be the default. Click **Book Multiples using this Doctor**.

Line	appointments of	unit	per	week	for	week(s)
1	3	1	per	week	1	week(s)
2	2	every 2nd	month	2	month(s)	
3	3	every 3rd		3		
4	4			4		
5	5			5		
6				6		
7				7		
				8		
				9		
				10		
				11		
				12		

The subsequent screen allows you the option to create or choose a multiple. Click onto a number under each row to create a schedule. Your choice appears on the blue line listing the number of appointments and units for a number of weeks or months.

Once you are satisfied that the blue line, ① represents the schedule you wish to add click **Add the current line**, ②.

Your selection will move up to the Current Multiple box where you can continue to add more appointments by following the same procedure.

Saving The Multiple. You can save this multiple for use when booking multiple appointments for other patients, thereby saving time. Click **Save this Multiple**. Type a name that describes the multiple. Click **OK**.

Select A Multiple. Click **Select a Multiple** from the previous screen; double click the multiple of choice.

- The 'named' area to the right lists the schedule. Checkmarks indicate booked appointments. You will need to have checkmarks beside every item in order to complete.

Acute Cervical

☒ 1 3 appointments of 1 unit, per week, for 2 weeks

☒ 2 2 appointments of 1 unit, per week, for 2 weeks

☐ 3

☐ 4

☐ 5

- The calendar area shows booked appointments. It indicates conflicts where edits or cancellations will need to be completed. These appointments are signified by colour coding. The legend is detailed at the bottom of the screen.

	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M					
Sep						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
Oct	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Nov			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
Dec				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Jan		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
Feb				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28				
Mar				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Apr	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
May		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
Jun			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
Jul	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Aug		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
Sep				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
Oct	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				

☒ H ☒ V ☒ Good Appt. ☒ Curr. G. Appt. ☒ Failed Appt. ☒ Current F. Appt. ☒ Cancelled Appt. ☒ Curr. C. Appt.

After completing the first line of scheduled appointments you will need to delete one of the times in order to be able to move to next line of scheduled appointments. Click into the field below one of the days of the week and then click the **Delete this Time** button. Click **goto Next Line**.

Make Appointments for the current line of the 'Multiple'

Line 2 2 appointments of 1 unit, per week, for 2 weeks

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	4:00 PM		4:00 PM		4:00 PM	

Please enter in 2 times in the above boxes

The second set of scheduled appointments below the 'Named' area will now be processed and show any conflicting appointments that need to be edited or cancelled before continuing.

Handling Conflicts And Changing Variables

You can edit all appointments that appear as conflicts (red on yellow). Click onto the conflict or appointment that you wish to correct.

	S	M	T	W	T	F	S	S
Sep						1	2	3
Oct	1	2	3	4	5	6	7	8
Nov			1	2	3	4	5	

A new screen appears asking you to Select another time for this appointment.

Notice the '3 *' (asterisk) in the time slot that we had selected. The '*' indicates the time chosen. The '3' indicates the number of units (columns) already booked at this time. This practitioner has three columns available on his appointment book and therefore the reason the appointment failed is the time slot is already full.

Select another time for the Appointment

	Thu	Fri	Sat
3:00 PM			
3:15 PM			
3:30 PM			
3:45 PM			
4:00 PM		3 *	
4:15 PM			
4:30 PM			
4:45 PM			
5:00 PM			

Doctor
 Dr. D.D. Palmer, DC

Type of Appointment
 Adjustment

Units
 1

Appointment Comments
 [Text Box]

Click on a Time/Day Slot to move the Appt.

At this point you can change the appointment:

- to another time by clicking into another time slot
- to another day by clicking onto a time slot on a different day
- to another doctor

You can also change:

- the type of appointment
- the units of time
- the appointment comments

If you have edited the appointment to eliminate the conflict click **Book Appointment**. If you wish to cancel the appointment click **Cancel Appointment**.

Once all the appointments are complete click **Accept**. Click **Yes** when asked if you would like to book the appointments.

Click **Print Calendar**. If you choose you can add comments to the bottom of the patient calendar by typing into the large white area or choose a pre-existing comment by double clicking an item from the Select a Comment box.



Note: Comments are created under the **Setup** menu, **Other Comments**.

The calendar can be printed out for different periods of time. Click on the radio button to the left of the appropriate time. Click **Print the Calendar**.

The appointment calendar now appears on screen. Each page contains two months of appointments. Letterhead information will be pulled from Clinic Defaults.

Mississauga Chiropractic Clinic
 123 Sacroiliac Avenue, Mississauga
 ON, L4B 1W4, Phone: 905-629-8211

September 2008 Appointments for Mary Brown

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18 A 4:00 PM	19	20 A 4:00 PM	21	22 A 4:00 PM	23
24	25 A 4:00 PM	26	27 A 4:00 PM	28	29 A 4:00 PM	30 A 9:30 AM

October 2008 Appointments for Mary Brown

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 A 4:00 PM	3	4	5	6 A 4:15 PM	7
8	9	10	11 A 9:30 AM	12	13 A 9:30 AM A 4:15 PM	14 A 9:30 AM
15 A 9:30 AM	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Legend A Dr. D.D. Palmer, DC

Comments All rescheduled appointments require 24 hour notice.

Posting Activity

Accessing Patient Activity

There are five ways to access Record Activity and Payments.

1. From the **Patient Menu**
 2. Clicking on a Patient appointment on the Appointment Book
 3. Pressing **F10** on a Patient appointment on the Appointment Book (shortcut)
 4. Pressing **F12** on the Appointment Book (shortcut)
 5. From within **Patient Information** on the **Account/Activity** tab
- From the **Patient Menu**
Go to the **Patient** menu and choose **Record Activity and Payment**. Click onto or type the underlined letter on the button you wish to use for your search criteria. Select the patient by double clicking on them or highlight and press **Enter**
 - Clicking on a Patient appointment on the Appointment Book
Click onto the patient on the appointment book and press the **F10** key or click the **Activity (F10)** button
 - Pressing **F10** on a Patient appointment on the Appointment Book
Move the cell pointer over the appropriate patient on the appointment book. Press **F10**
 - Pressing **F12** on the Appointment Book
Press **F12** on the appointment book and click onto or type the underlined letter on the button you wish to use for your search criteria. Select the patient by double clicking on them or highlight and press **Enter**. This is a shortcut for walk-in patients and for those offices not using the PMP appointment book schedule for patient appointments.
 - From within **Patient Information** on the **Account/Activity** tab
In the Patient Information screen press **F10** from any tab or click the **Account/Activity** tab and click the **Activity** button.

Patient Activity

Treating Doctor
Dr. D. D. Palmer, DC

Location
Main Clinic

Code	Description	Total	Billing	Patient

Default Code: SUB (F11) 0.00 0.00 0.00

Delete Row: SUB (F11)

Payment Amount

☐ Amount 0.00

☒ None 0.00

☐ Today's Fees 0.00

☐ Account Balance -100.00

☐ Related Balance 0.00

☐ Preset Payment 0.00

☐ Dr. No. 1 -100.00

Pay this Amount \$0.00

Payment Type Cash

Print Receipt ☐

Print Statement ☐

Last Statement Date

Post

Press F10 to Pay Press F9 to Write off

Posting Patient Transactions

The Patient Activity screen begins with Treating Doctor. The listed practitioner will be either the practitioner with whom the patient was booked or the Doctor of Record if you entered using the **F12** key. Change the Treating Doctor if necessary.

Click into the field below the word Code to bring up a list of your Fee Schedule. Scroll through the list or type the first few letters of the code for the item you are searching for.

For instance, if you type the letter '**C**', the Fee Schedule opens and takes you to the beginning of the fees that have a code starting with '**C**'.

The screenshot shows the 'Patient Activity' window. At the top, there are fields for 'Treating Doctor' (Dr. D.D. Palmer, DC) and 'Location' (Main Clinic). Below these is a table with columns: Code, Description, Total, Billing, and Patient. The first row shows 'SUB Subsequent Visit' with values 26.50, 10.50, and 16.00. Below this is a larger table with columns: Code, Description, Extra, Billing, and Patient. It lists various services like REFUND, Discharge Report, report, Report of Findings, Subsequent Visit (highlighted), Supports, TRANSFER, WCB TRANSFER TO PATIENT, X-Ray Cervical Spine, and X-Ray Full Spine. At the bottom left, there is a summary section with radio buttons and text boxes for 'Account Balance' (\$2.00), 'Related Balance' (0.00), 'Preset Payment' (0.00), and 'Dr. No. 1' (\$2.00). To the right of this are checkboxes for 'Print Receipt', 'Print Statement', and 'Last Statement Date'. A 'Post' button is at the bottom right. At the very bottom, it says 'Press 'F10' to Pay Press 'F9' to Write off'.

Locate and double click the item you are searching for or highlight and press **Enter**. The amount listed under the Patient column is editable. To change this amount, click into the field, edit the amount and press the **Tab** or **Enter** key when you have finished.

You can select more than one activity or inventory item by clicking into the code field below the previous activity or typing a new code letter. A **Default Activity (F11)** button is located above the Payment Amount. This is used for selecting the typical treatment that the patient receives. You can either click this button or press **F11** to select the default activity instead of locating the treatment yourself. Default Activity is set up in Patient Information on the Personal tab.

Posting the Payment


Once you have selected all activity click the appropriate **Payment Amount** from the list.

The screenshot shows the 'Payment Amount' dialog box. It contains a list of payment options, each with a radio button and a corresponding text box showing the amount. The options are: 'Amount' (0.00), 'None' (0.00), 'Today's Fees' (60.00), 'Account Balance' (60.00), 'Related Balance' (0.00), 'Preset Payment' (0.00), and 'Dr. No. 1' (60.00). The 'None' option is currently selected.

- **Amount** allows you to type a payment amount in the field to the right
- **None** means no payment was made

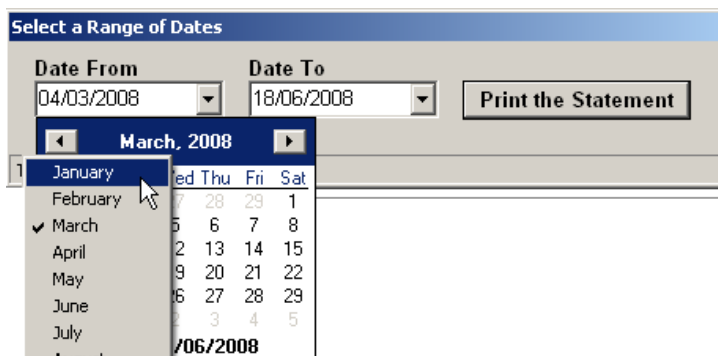
- **Today's Fees** will pay the amount listed to the right which is the total of today's billings for the treating practitioner
- **Account Balance** will pay the total to the right which is the entire balance owed to all practitioners for this patient
- **Related Balance** pays the total to the right which is the entire balance for this patient and all patients they are 'linked' to in Related Patients on the Personal tab of Patient Information
- **Preset Payment** will pay the total to the right which is the preset amount listed on the Account Activity tab of Patient Information
- **Dr. No. _** will pay the amount listed to the right which is the total owed to the treating doctor only

Click the down arrow under Payment Type and choose the correct payment type.

 **Note:** A payment type can be set up in the Patient Information on the Personal tab under the field **Payment Type** that will be the default when posting payments.

Printing Receipts and/or Statements

You can choose to print a receipt or statement at the time of posting. A receipt is a list of today's transactions and payments only. A statement is a list of transactions between specified dates. When you choose the statement option you are prompted to specify the statement date range. The default start date will be next day after the last statement end date. If there is no previous statement date the start date will default to the date set up in Clinic Defaults. The end date will default to today's date. These dates can be edited by clicking the down arrow and choosing another date on the calendar. Change the month and/or year by clicking onto the month or year at the top of the calendar and choosing another date from the list. You can type the dates into the Date From and Date To fields as dd/mm/yy. The last statement date field in Patient Information on the Account Activity tab will be updated after Posting.



Select a Range of Dates

Date From: 04/03/2008 Date To: 18/06/2008

Print the Statement

March, 2008

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
January							
February					28	29	1
✓ March	5	6	7	8			
April	2	13	14	15			
May	9	20	21	22			
June	16	27	28	29			
July	3	4	5				
August							

06/2008

Posting the Activity

Click **Post**.

The transaction is now complete. The summary sheet will be updated to reflect this activity, related patient balances will be paid automatically and added to summary sheets, receipts and/or statements will be printed.

How you accessed the patient activity and whether the patient has another appointment booked will determine what appears on screen next:

- If you entered the patient activity screen from an on-screen appointment and the patient you are processing has another appointment booked you will see a pop up entitled 'Yes, or No' confirming the patients next appointment. Click **Yes** to confirm and you will be taken back to the appointment screen. If you choose **No** you will be taken to the Appointment tab in Patient Information to delete or edit the appointment.
- If you entered the patient activity screen from an on-screen appointment and the patient you are processing does not have another appointment you will be taken to the Appointment tab of Patient Information to allow you to book the next appointment.
- If you entered the activity screen from the patient menu or F12 you will return to the appointment book screen without future appointment details or prompting for additional booking.
- If you entered the activity screen from the Activity button located in the Patient Information screen you will be returned to the same screen.

Posting Payments Only

Access the Patient Activity screen as seen in previous instructions.

Instead of choosing a code for activity, press **F10**. A payment line will be created. The cursor is now activated under Payment Amount at the **Amount** field. Type the amount of the payment or click the radio button to left of the relevant payment option.

Determine the Payment Type by clicking the down arrow and selecting the appropriate type. Click **Post**.

The screenshot shows the 'Patient Activity' window. At the top, 'Treating Doctor' is set to 'Dr. D.D. Palmer, DC' and 'Location' is 'Main Clinic'. Below this is a table with columns: Code, Description, Total, OHP/walk, and Patient. A single row is visible with Code 'PAYM', Description 'Payment', and zeros in the other columns. Below the table, there are fields for 'Delete Row' and 'Default Code'. To the left, under 'Payment Amount', are radio buttons for 'Amount', 'None', 'Today's Fees', 'Account Balance', 'Related Balance', 'Reset Payment', and 'Dr. No. 1', each with a corresponding value field. To the right, 'Pay this Amount' is set to '\$77.00'. Below that, 'Payment Type' is set to 'Cheque'. There are checkboxes for 'Print Receipt' and 'Print Statement', and a 'Last Statement Date' field set to '19-Jan-2000'. A 'Post' button is at the bottom right. A footer note says 'From here you can press F10 to Post'.

Patients Who Do Not Have Appointments (Walk-Ins)

Press **F12** while on the appointment book and select your patient by the method of your choice. Double click or press **Enter** on the appropriate patient.

Once in the patient activity follow through with Posting Patient Transactions.

These patients will appear as DONE appointments on the appointment book. They will not have an appointment type and the words 'WALK-IN' will appear in comments and on the Appointment tab in Patient Information.

Discount

PMP handles discounts to allow you to decrease patient cost for specified items. To Post a **Discount** press **F12** on the appointment book and select your patient or get into the Patient Activity screen in your usual manner. Enter your transaction in your usual manner. Press **Enter** or the **Tab** key to create a second line. Type **DI** or click into the Code field and select **Discount**. The cursor is now activated in the patient fee area. Type the discount amount with a minus sign, ie. -20.00. Press Tab. The discount line now shows the fee reduction in red and the total fee for today includes the discount. Click **Post**.

The screenshot shows the 'Patient Activity' window. At the top, 'Treating Doctor' is 'Daniel David Palmer, DC #4444' and 'Location' is 'Main Clinic'. Below is a table with columns: Code, Description, Total, Billing, and Patient. The first row is 'LUM Lumbar Pillow' with values 50.00, 0.00, and 50.00. The second row is 'DI Discount' with values -15.00, 0.00, and -15.00 (the -15.00 is in red). At the bottom, there is a 'Default Code' section with 'Delete Row' and 'No Default' buttons, and a summary row showing 35.00, 0.00, and 35.00.

Code	Description	Total	Billing	Patient
LUM	Lumbar Pillow	50.00	0.00	50.00
DI	Discount	-15.00	0.00	-15.00
Default Code		35.00	0.00	35.00



Note: Summary sheet shows a total of the discounts if you use the code "DI". This total can be given to your accountant to provide information for your records of the amount of reduced or complimentary services your office provides.

Refund

There are two types of patient refunds. The first is a refund that is required due to an overpayment.

To Post a Refund press **F12** on the appointment book and select your patient or get into the Patient Activity screen in your usual manner. Type **REF** or click into the Code field and select **Refund**. Leave the patient fee at 0.00. Press **Enter**. Press **Enter** or the **Tab** key to create a second line.

The screenshot shows the 'Patient Activity' window. 'Treating Doctor' is 'Dr. D.D. Palmer, DC' and 'Location' is 'Main Clinic'. The table has columns: Code, Description, Total, Billing, and Patient. The first row is 'REF REFUND' with values 0.00, 0.00, and 0.00. The second row is marked with an asterisk (*) and is empty.


Code	Description	Total	Billing	Patient
REF	REFUND	0.00	0.00	0.00
*				

To create the refund amount either click the radio button to the left of **Amount** and type in the amount of the refund with a minus sign, i.e. -50.00 or click the radio button to the left of **Account Balance** if the amount is correct

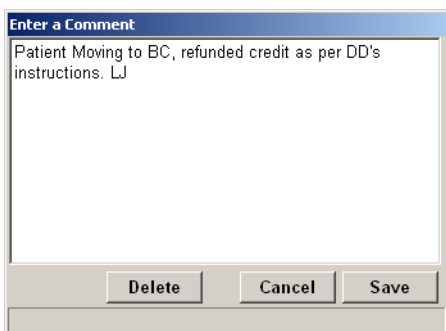
The screenshot shows the 'Patient Activity' window with the 'REF REFUND' transaction. Below the table, there is a 'Payment Amount' section with radio buttons for 'Amount', 'None', 'Today's Fees', 'Account Balance', 'Related Balance', 'Preset Payment', and 'Dr. No. 1'. The 'Amount' radio button is selected, and the value '-50.00' is entered. To the right, there is a 'Pay this Amount' section with a text box showing '\$50.00' and a 'Payment Type' dropdown menu set to 'Cheque'. At the bottom, there are checkboxes for 'Print Receipt' and 'Print Statement', and a 'Last Statement Date' field. A 'Post' button is at the bottom right.

From here you can press F10 to Post

Select the method of the refund i.e. Cash, Cheque, etc. under Payment Type. Click **Post**.

 **Note:** Your end of day receipts will not match your summary sheets if you write a Cheque to your patient for the amount of the refund. If you refund by cash, debit or credit card, your day end receipts will be accurate.

In the Patient Information Account Activity screen add a comment to the refund by clicking onto the refund line and clicking the **Edit Comment** button. Type an explanation for the transaction. Type your initials. Click **Save**.



Enter a Comment

Patient Moving to BC, refunded credit as per DD's instructions. LJ

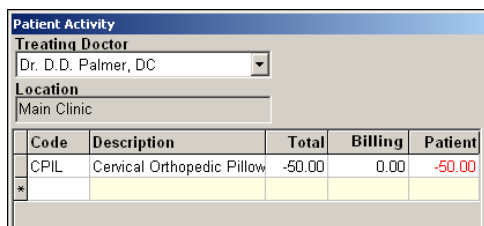
Delete Cancel Save

Inventory Refund

The second type of refund is because of a fee reduction of inventory return.

This is a two step process:

1. Return the inventory
 2. Process the refund
1. **Return the inventory item.** Press **F12** on the appointment book and select your patient or get into the Patient Activity screen in your usual manner. Locate and select the original inventory item. Click into the column under Patient. Type in the cost of the item with a minus sign, i.e. -50.00 and press **Enter** or the **Tab** key. Click the radio button to the left of None in the payment amount area. Click **Post**.



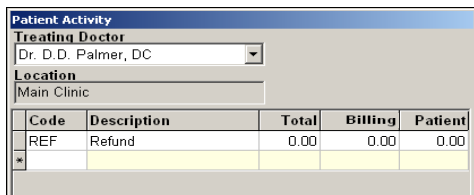
Patient Activity

Treating Doctor
Dr. D.D. Palmer, DC

Location
Main Clinic

Code	Description	Total	Billing	Patient
CPIL	Cervical Orthopedic Pillow	-50.00	0.00	-50.00
*				

2. **Process the refund.** Get back into Patient Activity. Type REF or click into the Code field and select **Refund**. Leave the patient amount at 0.00. Press **Enter**. Press **Enter** or the Tab key to create a second line.



Patient Activity

Treating Doctor
Dr. D.D. Palmer, DC

Location
Main Clinic

Code	Description	Total	Billing	Patient
REF	Refund	0.00	0.00	0.00
*				

To create the refund amount either click the radio button to the left of Amount and type in the amount of the refund with a minus sign, i.e. -50.00 or click the radio button to the left of Account Balance if the amount is correct.

Select the method of the refund i.e. Cash, Cheque, etc. under Payment Type. Click **Post**.



Note: Your end of day receipts will not match your summary sheets if you write a Cheque to your patient for the amount of the refund. If you refund by cash, debit or credit card, your day end receipts will be accurate.

In the Patient Information Account Activity screen add a comment to the refund by clicking onto the refund line and clicking the **Edit Comment** button. Type an explanation. Type your initials. Click **Save**.



Note: If the returned inventory item can be sold again, you will want to increase your **Amount in Stock** for this item in **Fee Schedule, Inventory**.

Activity Date

The Activity Date function allows you to change the date for processing transactions that occurred on a previous day.

Go to the **Utilities** menu, then **Activity Date**. To set the date back, click onto the appropriate day on the calendar. For a previous month click the back arrow once for every month you wish to move back. You can also click onto the month or year to produce a list of months / years. Click **Accept Changes**. Once you have returned to the main appointment screen you will see a red border around the screen. This indicates that activity posting will be on a date prior to today.

Process the necessary transactions. Print the summary sheet and attach it to the original summary sheet for that date to explain any changes in accounts receivable.

To return to today go to the **Utilities** menu, **Activity Date**. Click **Reset to System Date**, then **Accept Changes**.

The 'Activity Date' is the date your program is working with, or your Posting date. When you first start your program, the 'Activity Date' is set to your Computer's current System Date. Normally you wouldn't need to change this date. If you set your 'Activity Date' to a date before the System Date then your appointment book will become surrounded by a 'Red' Border. If you set the date to a date after the System Date then the border will become 'Yellow'. The 'Today' button always takes you back to the 'System Date'. If you change the 'Activity Date' a button labelled 'Activity Date' will become visible on the appointment book. Pressing this button will return you to the current 'Activity Date'. Please note that you cannot choose an 'Activity Date' prior to the 'Edit Date'.

Editing and Deleting Transactions

There are times after processing patient activity that you have to edit or delete a transaction. For example the patient could have paid you after the visit had been posted or you posted an incorrect patient.

Get into the **Patient Information Account Activity** tab.

- **To Edit a Transaction** click the item to be edited and click **Edit**. A pop up window will appear entitled Edit a Transaction. The area on the left is the activity before the edit. Modifications take place on the right side of the screen. When attempting to alter a date please note that you can only move the date forward. Click in to the field that you wish to change.

Once the change is complete, click **Accept Modified Record**. If no changes are made click **Cancel**. A message box will appear noting *You've edited a transaction....* Type an explanation for the edit and add your name or initials. Click **OK**. Changes will be recorded in the Account Edit Journal along with the comment.

- **To Delete a Transaction** click the item to be deleted. Click the **Delete** button. A pop up window will appear asking if you would like to delete the payment as well. Answer **Yes** or **No**. Another window will appear asking you to confirm the deletion. Click **OK**. A message box will appear noting *You've deleted a transaction....* Type an explanation for the deletion and add your name or initials. Click **OK**. Changes will be recorded in the Account Edit Journal along with the comment.

✓ **Hint:** All PMP users in your office should be instructed to detail the reason for the edit or deletion and note their name upon seeing the comment box.

Transfer Credits / Balances between Patients

To transfer credits from one patient to another:

- **Add Transfer to your Fee Schedule if necessary.** Click the **Setup** menu, **Fee Schedule, Other**. Click **Add**. Type TRAN into the code field and Transfer into the description field. Leave the amount at 0.00. Click **Save**.
- **Add Transfer to your Payment Types if necessary.** Click the **Setup** menu, **Payment Types**. Click **Add**. Type Transfer into the Description field and TRAN into the Short description field.
- **Transfer the Amount from the Patient with the Credit.** Get into Patient Information on the Account Activity tab for the patient that has the credit. Press **F10**. Select Transfer from the activity list. Press the **Tab** key. Below Payment Amount click Amount and type the total to transfer with a minus sign before the amount, i.e. -100.00. Change the Payment Type to Transfer. Click **Post**.

The screenshot shows the 'Patient Activity' window for Dr. D.D. Palmer, DC. The 'Treating Doctor' is set to Dr. D.D. Palmer, DC, and the 'Location' is Main Clinic. A table lists activities with columns: Code, Description, Total, Billing, and Patient. The first row shows 'TRAN' for 'Transfer' with a Total of 0.00, Billing of 0.00, and Patient of 0.00. Below the table, there are fields for 'Delete Row', 'Default Code', and 'No Default'. To the right, there are fields for 'Pay this Amount' (set to \$100.00), 'Payment Type' (set to Cash), and checkboxes for 'Print Receipt' and 'Print Statement'. The 'Last Statement Date' is 29-Mar-1998. A 'Post' button is at the bottom right. A footer note says 'From here you can press F10 to Post'.

- **Transfer the Amount to the Patient with the Balance.** Get into Patient Information on the Account Activity tab for the patient that has the balance owing. Press **F10**. Select Transfer from the activity list. Press the **Tab** key. Below Payment Amount click Amount and type the total of the transfer, i.e. 100.00. Change the Payment Type to Transfer. Click **Post**.

These transactions will now appear in succession on the summary sheet. There should be no change in the monies for the day as this is a direct transfer.

Transfer Credits / Balances between Practitioners

You may wish to transfer a balance /credit from one practitioner to another. For instance you may want to transfer the \$30.00 owed to DD to LH.

View all Doctor balances									
Total	Dr. DD	Dr. LH	Dr. BP	Dr. AB					
30.00	30.00	0.00	0.00	0.00					

- **Add Transfer to your Fee Schedule if necessary.** Click the **Setup** menu, **Fee Schedule, Other**. Click **Add**. Type TRAN into the code field, Transfer into the description field, and leave the amount at 0.00. Click **Save**.
- **Add Transfer to your Payment Types if necessary.** Click the **Setup** menu, **Payment Types**. Click **Add**. Type Transfer into the Description field and TRAN into the Short description field.

- **Transfer the Amount from the Practitioner with the Balance / Credit.** Get into Patient Information on the Account Activity tab for the patient that has the balance / credit. Press **F10**. Change the Treating Doctor field to the practitioner with the amount to be transferred. Select **Transfer** from the activity list. Press the **Tab** key. Click **Amount** and type the amount to transfer, i.e. 30.00 or -30.00. If your patient owes this practitioner money, the transfer amount is positive. If there is a credit balance, the transfer amount is negative. Change the Payment Type to **Transfer**. Click **Post**.

The screenshot shows the 'Patient Activity' window. The 'Treating Doctor' is set to 'Dr. D.D. Palmer, DC' and the 'Location' is 'Main Clinic'. A table lists activities with columns 'Code', 'Description', 'Total', 'Billing', and 'Patient'. The first row shows a 'Transfer' (TRAN) with a total of 0.00, billing of 0.00, and patient payment of 0.00. Below the table, the 'Payment Amount' section has 'Amount' set to 30.00. The 'Pay this Amount' section shows '\$30.00'. The 'Payment Type' is set to 'Transfer'. There are checkboxes for 'Print Receipt' and 'Print Statement', and a 'Last Statement Date' of 29-Mar-1998. A 'Post' button is at the bottom.

- **Transfer the Amount to the Other Practitioner.** Press **F10** again. Change the Treating Doctor field to the practitioner to who is receiving the transferred balance. Select Transfer from the activity list. Press the **Tab** key. Click Amount and type the amount to be transferred, i.e. -30.00 (the opposite of the amount transferred above). Change the Payment Type to Transfer. Click **Post**.

The screenshot shows the 'Patient Activity' window. The 'Treating Doctor' is now 'Laurel Hardy, MT' and the 'Location' is 'Main Clinic'. The table shows a 'Transfer' (TRAN) with a total of 0.00, billing of 0.00, and patient payment of 0.00. In the 'Payment Amount' section, 'Amount' is set to -30.00. The 'Pay this Amount' section shows '(\$30.00)'. The 'Payment Type' is set to 'Transfer'. There are checkboxes for 'Print Receipt' and 'Print Statement', and a 'Last Statement Date' of 29-Mar-1998. A 'Post' button is at the bottom.

The balance is now owed to LH.

Date	Ref. Date	Doc	Location	Code	Bill Code	Type	Status	Paid by	Billing	Patient	Payment
06/10/2006		DD	1	A		CASH	Paid		0.00	30.00	0.00
06/10/2006		DD	1	TRAN		CASH	Paid	TRAN	0.00	0.00	30.00
06/10/2006		LH	1	TRAN		CASH	Paid	TRAN	0.00	0.00	-30.00

Returned Cheques

To record a returned cheque in PMP complete the following steps:

- **Add Returned Cheque to your Fee Schedule if necessary. Also add Returned Cheque Charge** if it is your office policy to charge your patient when the bank returns a cheque. Click the **Setup** menu, **Fee Schedule, Other**. Click **Add**. Double click into the code field and type RC into the code field. Type Returned Cheque into the description field. Leave the amount at 0.00. Click **Save**. Click **Add**. Double click into the code field and type RCC into the code field and Returned Cheque Charge into the description field. The amount should be the fee you charge for a returned cheque. Click **Save**.
- **Posting the Returned Cheque:** Get into Patient Information on the Account Activity tab for the patient whose cheque was returned. Press **F10**. Select RC – Returned Cheque from the activity list. Press **Enter**. The patient amount should be left at zero. Select RCC – Returned Cheque Charge from the activity list. Press the **Tab** key. Below Payment Amount click the radio button beside amount and type the total of the returned cheque with a minus sign before the amount, i.e. -100.00. Change the Payment Type to Cheque. Click **Post**.

The screenshot shows the 'Patient Activity' window for 'DR. PAUL' at 'Main Clinic'. It contains a table with the following data:

Code	Description	Total (GBP/USD)	Patient
RC	Returned Cheque	0.00	0.00
RCC	Returned Cheque Charge	15.00	0.00

Below the table, the 'Default Code' is set to 'No Default'. The 'Delete Row' button is visible. The 'Payment Amount' section shows a list of radio buttons with values: Amount (-100.00), None (0.00), Today's Fees (15.00), Account Balance (15.00), Related Balance (0.00), Preset Payment (0.00), and Dr. No. 1 (15.00). The 'Pay this Amount' field is set to (\$100.00). The 'Payment Type' is set to 'Cheque'. There are checkboxes for 'Print Receipt' and 'Print Statement', and a 'Last Statement Date' field set to 18-Aug-2009. A 'Post' button is at the bottom right.

These transactions will now appear on the summary sheet and in the patient file. There will be a reduction in the receipts on your daily summary and the total will **not** match the total of the cheques in your cash drawer.

Gift Certificate

Add gift certificate to your Fee Schedule *if necessary*. Click the **Setup** menu, **Fee Schedule, Other**. Click **Add**. Double click into the code field and type GC. Type Gift Certificate into the description field. Make the Selling Amount \$0.00.

Gift Certificates (GC) can be used in two ways depending upon the set up of your office:

- A gift certificate will be used by one practitioner only
- A gift certificate can be used by more than one practitioner.

1. Gift certificate is used for one practitioner only.

- **Sale of GC.** Get into the Patient Activity screen in your normal manner. Locate and select the **Gift Certificate** from the list. Press **Enter** or **Tab** to create a second line. The selling amount should be

\$0.00. The Payment amount will reflect the cost of the GC. Click onto the radio button to the left of **Amount** and type the amount of the payment. Choose the **Payment Type** from the list, click **Post**.

This will have the effect of recording the money received and creating a credit on the patient file. There is no change in revenue; no service has been given.

- *Redemption of CG.* Get into the Patient Activity screen in your normal manner. Locate and select the treatment that the patient had from the list. Click onto the radio button to the left of **None**. Change the **Payment Type** to **Gift Certificate**. Click **Post**.

2. *Gift certificate can be used by more than one practitioner.*

Create a new patient file named Gift Certificate by pressing **F6** from the appointment book. Type the first name as 'Gift' and the last name as 'Certificate'. Make the Doctor of Record the first DC in your office. Click **Save**.

Create a payment type named Gift Certificate. Go to the **Setup** menu, **Payment Type**. Click **Add**. Type 'Gift Certificate'; press the **Tab** key type 'GC'. Click **Save**.

- *Sale of GC.* Get into the Patient Activity for the patient Gift Certificate. Leave the Treating Doctor as the first DC. Locate and select the **Gift Certificate** from the list. Press **Enter** or **Tab** to create a second line. The selling amount should be \$0.00. The Payment amount will reflect the cost of the GC. Click onto the radio button to the left of **Amount** and type the amount of the payment. Choose the **Payment Type** from the list, click **Post**.

This will have the effect of recording the money received and creating a credit on the account for the patient file Gift Certificate. There is no change in revenue; no service has been given. Post to the first DC because that is the bank account that should get the money.

- *Redemption of CG.* Get into the Patient Activity screen for the patient in your normal manner. Make sure the Treating Doctor is the practitioner who performed the treatment. Locate and select the treatment that the patient had from the list. Click onto the radio button to the left of **Amount** and type the amount of the GC. Change the **Payment Type** to **Gift Certificate**. Click **Post**.

The revenue or fee will show on the day summary sheet for the treating practitioner and the receipts will balance because you received the gift certificate as payment.

- *To balance the actual cash* get into the Patient Activity screen for the Gift Certificate patient file. Type 'TRAN' or click into the Code field and select **Transfer**. Press **Enter**. Press Enter or the **Tab** key to create a second line. Click the radio button to the left of **Amount** and type in the amount of the GC with a minus sign, i.e. -50.00. Change the **Payment Type** to **Gift Certificate**. Click **Post**. This transaction will reduce the credit balance on the Gift Certificate patient and has no impact on total revenue.

Suggestions

Some offices number their gift certificates. You can record this information in the patient comment area for the Gift Certificate patient e.g. "Oct1-08 sold GC#0052 - redeemed Feb14-09".

If a gift certificate expires you need to reflect an increase in income because you received money but did not render a service. Create a fee schedule item called "expired gift certificate" with a 'zero' fee and post this transaction anytime you need to eliminate a credit on account because of an unused or expired gift certificate. The fee will equal the price of the certificate purchased and would be entered when you post the transaction.

Write Offs

Patient Write Off

Get into the Patient Activity screen or press **F12** from the appointment book and locate the patient. Press **F9**. A write off information line will appear. The cursor is now activated in the **Amount** field.

The screenshot shows the 'Patient Activity' window. At the top, there are dropdowns for 'Treating Doctor' (Dr. D.D. Palmer, DC) and 'Location' (Main Clinic). Below these is a table with columns: Code, Description, Total, WCB, and Patient. A single row is visible with Code 'WO', Description 'Write Off', and zeros in the other columns. Below the table are buttons for 'Delete Row' and 'No Default'. To the right of these buttons are three input fields with values 0.00, 0.00, and 0.00. Below the table is a 'Payment Amount' section with radio buttons and input fields for: Amount (0.00), None (0.00), Today's Fees (0.00), Account Balance (20.00), Related Balance (0.00), Preset Payment (0.00), and Dr. No. 1 (20.00). To the right of this is a 'Pay this Amount' section with a dropdown for 'Payment Type' (Cash) and checkboxes for 'Print Receipt' and 'Print Statement'. At the bottom right is a 'Last Statement Date' field and a 'Post' button. A footer note says 'From here you can press F10 to Post'.

Type the amount of the write off or click the **Account Balance** radio button if the amount is correct. Click **Post**.

Reversing a Write Off

You may on occasion be required to reverse a write off. There are two steps involved in this procedure:

1. Get into Patient Information on the Account Activity screen, press **F10**. Press **F9**. A write off information line will appear. The cursor is now activated in the **Amount** field. Type the amount of the write off to be reversed. Click **Post**. The amount is shown as a credit in the patient balance at this point.
2. Click onto the write off (**WO**) line, click **Edit**. Click into the Patient Amount box on the right and highlight only the minus sign (-). Press delete. Click **Accept Modified Record**. Type the reason for the reversal into the comment field. Click **OK**.

Below is how the account would look after reversing a write off.

Patient Information 18 - Alexander Lloyd											
Personal Comments Pop Ups Manitoba Bill To / Employer Appointments Account / Activity EHC											
Date	Ref. Date	Doc	Location	Code	Bill Code	Type	Status	Paid by	Billing	Patient	Payment
20/01/2006		DD	1 A			CASH	Paid		0.00	10.00	0.00
14/08/2006		DD	1 WO			CASH	Paid		0.00	-10.00	0.00
21/09/2006	✓	DD	1 WO			CASH	Paid		0.00	10.00	0.00

Credit Write Offs

There are 2 steps involved in writing off a credit. Please note writing off a credit should only be done after continued attempts to refund the patient have failed. Please check with your bookkeeper or accountant for more details.

1. Get into Patient Information on the Account Activity screen, press **F10**. Press **F9**. A write off information line will appear. The cursor is now activated in the **Amount** field. Type the amount of the credit as a positive number. Click **Post**. The amount of the credit has now doubled.
2. Click onto the write off (**WO**) line, click **Edit**. Click into the Patient Amount box on the right and highlight only the minus sign (-). Press delete. Click **Accept Modified Record**. Type the reason for the write off into the comment field. Click **OK**.

Below is how the account would look after writing off a credit.

Patient Information 18 - Alexander Lloyd											
Personal Comments Pop Ups Manitoba Bill To / Employer Appointments Account / Activity EHC											
Date	Ref. Date	Doc	Location	Code	Bill Code	Type	Status	Paid by	Billing	Patient	Payment
20/01/2006		DD	1	A		CASH	Paid	CASH	0.00	10.00	12.00
21/09/2006		DD	1	WO		CASH	Paid		0.00	2.00	0.00

WCB Write Offs

To write off stale dated WCB claims click the **Manitoba** menu, **Record Manual Payments, WCB**. Choose the practitioner; click **Prepare the report for this Doctor**. Locate the patient by clicking **Number**, **Surname**, or **First** and typing the search information into the **Search** field. Click the first visit you wish to write off under **Activity**.

Click into the **Current Line** amount box after selecting the date and type **0.00** into the amount field. Click **Accept Changes**. Click **2. TTP & WO**.

Click **Finish** when all claims to be written off have been handled. Print the WCB Payment Journal.

Payment Distribution Screen

(Multi Practitioner Offices Only)

A Payment Distribution screen will appear after processing a payment for a patient when more than one practitioner is owed money and the payment amount is not equal to the total owed.

Payment Distribution										
Account History										
Date	Doc	Code	Bill Code	Type	Status	Paid by	Billing	Patient	Payment	
14/09/2005	DD	A			Paid		0.00	30.00	0.00	
20/01/2006	DD	A			Paid		0.00	30.00	0.00	
19/04/2006	DD	A			Paid		0.00	30.00	30.00	
21/11/2006	DD	A			Paid		0.00	0.00	0.00	
24/11/2006	LH	MAS2			Paid		0.00	40.00	0.00	
Payment Worksheet										
Doctor	Balance Due	Payment								
1 Dr. D.D. Palmer, DC	90.00	<input type="checkbox"/>	160.00							
2 Laurel Hardy, MT	40.00	<input checked="" type="checkbox"/>	40.00							
3 Dr. Benjamin Pierce, DC	0.00	<input type="checkbox"/>	0.00							
4 Albert Schweizer, RMT #G456	0.00	<input type="checkbox"/>	0.00							
				Today's Payment 200.00 Amount to Allocate 0.00						
				Doctors in light grey, are on your system but are not currently shown on your active Appointment Book.						
				<input type="button" value="Accept"/>						

Enter Payments in the 'Payment' column or click on the checkbox to the left of the column to pay the entire balance

The lower half of the screen is named 'Payment Worksheet'. All the practitioners on your PMP will be listed here with account balances. Put a checkmark beside **Balance Due** only if you wish to pay the entire balance for that practitioner. If you wish to pay an amount different from the Balance Due type that amount into the field under **Payment**.

Each payment made in the worksheet will reduce the **Amount to Allocate** balance until the total is 0.00. The **Accept** button is only enabled when the amount to allocate reaches 0.00. Click **Accept**.

View All Doctor Balances

On occasion you may require the ability to edit the balance owing for a specific patient / doctor. This is not a procedure that is recommended unless it is done to correct a balance owing that was not created by a listed activity or to correct a balance transferred from another software conversion.

In the Patient Information screen on the Account / Activity tab click **View All Doctor Balances**. A pop up window will appear entitled Edit Balances.

Practitioners appear in the order they are listed on the Appointment Book. The practitioners that are on the current Appointment Book appear in white at the top of the window. The other practitioners that are listed on this program but not loaded on the Appointment Book are in grey and can still be edited.

Doctor	Doctor Name	Balance	New Balance
DD	Dr. D.D. Palmer, DC	140.00	140.00
LH	Laurel Hardy, MT	0.00	0.00
BP	Dr. Benjamin Pierce,	0.00	0.00
AB	Albert Schweizer, DC	0.00	0.00

Changes made to Doctor Balances will be reflected in Accounts Receivable and Account Edit Journal

Old Balance 140.00
New Balance 140.00
0.00

Doctors in light grey, are on your system but are not currently shown on your active Appointment Book.

Cancel OK

press Alt-E to edit

To alter a balance press the **Alt & E** keys at the same time. A **New Balance** column will become visible. Make the required changes. Click **OK**. An edit box will appear where you are expected to type an explanation for the edit. Initial your explanation.

Changes made in this area will be reflected in the **Accounts Receivable** and the **Account Edit Journal**.

You've changed a balance...

Changes made to fields in this area will affect practitioner revenue and / or Accounts Receivable. You will need to reprint summary sheets and notify your accountant or bookkeeper as to changes made. All edits will be reflected on the Account Edit Journal.

You may enter in a comment to explain why this action was made.

OK

Add a New Patient & Patient Information

Accessing the New Patient File

There are four ways to access the new patient file.

- From the **Patient** menu **Add New Patient**
- Right click on the appointment book, choose **Add New Patient**
- Click on an empty time slot on the appointment book, click **Add New Patient**
- Press the **F6** key when on the appointment book, click **New Patient**

Each of the four ways to add a new patient takes you to a new window with a blank patient record file. Across the top of this window you will see the heading 'Patient Information Adding a NEW Patient (Patient Number not yet assigned)'.

The Personal tab

The Personal tab contains basic information about the patient. You must enter the First and Last name of the patient to save the file. The patient number is automatically assigned upon saving using the Next Available Patient Number found under the **Setup** menu, **Doctor Defaults**.

If the patient to be added is related to a patient already in your database and they have the same address you can use the **Copy From Existing** button to copy basic demographic information into the new file.

Patient Information 1 - Adrienne Linton

Personal | Comments | Pop Ups | Bill To / Employer | Appointments | Account / Activity | OHIP / WSIB | EHC | MVA

Pat No. 1 **Doctor of Record** Dr. D.D. Palmer, DC

Preferred Location Clear

First Name Kathy **Last Name** James

Address
Street & Apartment or Unit # 2300 Smith Street
City Morden **Province** MB
Postal Code R0M 1X0 **Country** Canada

Referrals
Referral Method Patient **Referred By** Agnes Smith-643

Date of Birth 02-05-1959 **Age** 50 **Sex** Female

Phone Numbers 1
Home (905) 731-0702
Work (416) 633-3000 **Ext** 21
Cell (905) 988-7878 **Ext**

Email Address 2 Email alinton@work.ca

Maiden Name 3 Related Patients

Patient Type MH
Patient Category Adult
Payment Type 4 Debit Card
Default Code 5 A
Flags 6 P
Active ☒
Auto Statements ☐
Do NOT contact ☐
A/R Type Patient
Send Statements To Patient

Next Previous Save Cancel New Patient

Search for a Patient by
 Last name Number First name Other Continue

Press F2 to add an appointment, or press F10 to process an activity

Fill in the required information.

1

Phone Numbers

The phone number area will hold up to four phone numbers. Choose the type of phone number you are adding by clicking the down arrow and selecting the type from the list.

2

Email

The email button above the Email Address will open your electronic messaging program and address an email to the listed address.

3

Related Patients

Related Patients will allow you to link family members or multiple files for the same patient so that payments can be made for all outstanding accounts. Double click on each patient you wish to relate. Click **Continue**. **Do not** add the patient whose file you are in to the related selection.

4

Payment Type

A default payment type can be set up that will be used whenever you post activity.

5

Default Code

You can create a default activity for each patient that will post the activity with a single keystroke. Click the down arrow beside Default Code and choose the activity most often posted for this patient.

6

Flags

Flags are single digits or letters used to indicate something meaningful to you about the patient.

You may have up to eight flags per patient. Flags are created in the Setup menu, Flags. The Flag option can be chosen to select a particular group of patients for some reports, e.g. Queries.

The Comments tab

Enter relevant information into this tab that isn't stored elsewhere. There are no restrictions as to how much information can be stored.

You may predefine frequently used comments in the **Setup** menu, **Patient Comments**. Double clicking on the predefined comment under **Select a Comment** will enter it automatically into the body of the comments.

The Pop Ups tab

Pop Ups are information boxes that will appear on a patient file where and when you choose, giving information you have input and may require about this patient or their appointment. Locations where pop ups are designed to pop are chosen in the **Setup** menu, **Clinic Defaults**. → **See page 10 and 48**.

The Manitoba tab

The Manitoba tab includes tabs for Manitoba Health, Manitoba Public insurance, and Workers Compensation Board.

- The **Manitoba Health** tab contains:
 - The patients **MH Number**
 - **Visits Left**. This field automatically decreases when treatments are posted. On or your next business day after January 1st you will receive a pop up upon opening your PMP that asks you if you would like to reset the Manitoba health visits. If you have completed posted treatments from the previous year you can choose **Yes**. Choose No to continue inputting visits from the previous year. The pop up will appear every time you open PMP until you select **Yes**. Once you have selected to

renew the MH visit every patient will default to having 12 visits left. This field is editable should the amount be incorrect at any time.

- The **Diagnostic Code** which is chosen from a pick list.
- **Diagnostic Comments for C99** is a field where you type in any comments related to the Diagnostic Code of **C99 Other Conditions**
- **Fee after Manitoba Health expiry.** In this field choose the fee to bill the patient once their MH visits are exhausted. The **Full Fee** adds the MH fee to the patient fee and bills that amount. **Patient Fee** continues to charge the patient what they were charged will MH visits remaining. **Post Expiry Fee** will charge the patient the amount typed into the field box.
- The **MPI** tab contains specified fields to input relevant information that will populate reports and invoices. This tab also allows you to create **New Initial chiropractic**, **New Track I**, and **New Track II** reports.
- The **WCB** tab contains specified fields to input relevant information that will populate reports and invoices. This tab also allows you to create **New Chiropractor's First** and **Progress Reports**.

The Bill To / Employers tab

The Bill To / Employers tab houses information regarding the person or company that is responsible for the account if not the patient themselves or Workers Compensation.

The EHC tab

Input any relevant Extended Health Care information on this tab. Note these totals do not automatically count.

To save the new patient file click **Save**. Once saved two new tabs will appear:

The Appointments tab

The appointments tab houses all past and future appointments. It offers the option to **Add an appointment** (using the F2 Appointment Grid), **Book Multiple Appointments**, and after posting activity it offers **Add an appointment**, **Same time next week**, and **Same time next Month (28 days)**. You also have the option to **Print Calendar** and **Delete all Pending Appointments**.

The Account / Activity tab

The Account / Activity tab is where all financial transactions are stored. You can print receipts and statements from here, add comments to activity to explain their nature, and also edit and delete transactions.

The Lower Taskbar

The bottom portion of the Patient Information screen is a static screen. It is available on all tabs within the patient information screen. The **Next** and **Previous** buttons give you the choice of moving forward or backward one patient at a time, searching by either name or number depending upon the previous search criteria.

An envelope button is located in the middle of the screen which will print the name and address on an envelope or label for the patient currently being viewed. ➔ **See page 51.**



The buttons on the right offer you the ability to locate other patients by Last name, Number, First name, and Other.

The **Other** button offers various options for locating patients.

Search by		
<input type="radio"/> SIN	<input type="radio"/> Postal Code	<input type="radio"/> EHC 2
<input type="radio"/> Bill To / Employer	<input type="radio"/> WCB Claim #	<input type="radio"/> MVA
<input type="radio"/> Phone Number	<input type="radio"/> EHC 1	

The bottom taskbar shows hints regarding accessing the **F2 - to add an appointment** and **F10 - to process an activity**.

Click **Continue** to save changes and exit the patient information screen.

Advanced Features within the Patient File

Default Activity

You can create a default activity for each patient that will post the activity with a single keystroke. The setup for this is in Patient Information Personal tab. Click the down arrow beside **Default Code**. Choose the activity most often posted for this patient.

Press F2 to add an appointment, or press F10 to process an activity

Processing Patient Activity using Default Activity

When in the patient activity click **F11** or press the **Default Code** button to use the default activity.

Press F10 to Pay Press F9 to Write off

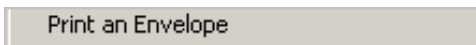
Envelopes / Labels

Envelopes and labels are located in three areas in the PMP:

- Right clicking on a booked appointment brings up the addressed envelope for that patient.



- An unused appointment slot brings up a blank envelope where you can type an address.

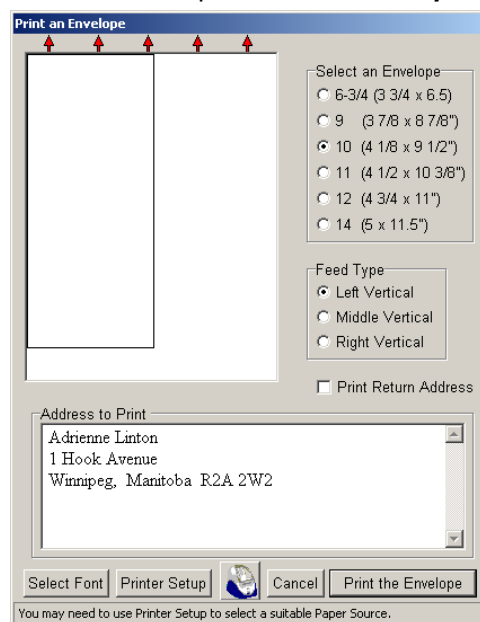


- In **Patient information** there is a button located on the bottom of the screen. This will bring up an addressed envelope for that patient on all tabs.



- In **Bill / To, EHC, and MVA** there is a button with a **?** on it. Click on it to bring up information for the company or person. An envelope button is located on the bottom right.

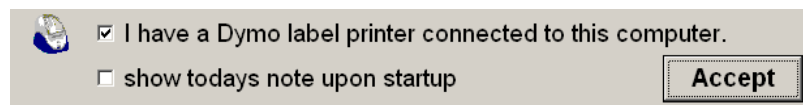
Click the envelope icon. For **Envelopes** select the following:



- The size of the envelope; **6-3/4, 9, 10, 11, 12, 14**
- Feed type depending on your printer; **Left, Middle, and Right Vertical**
- Check Print Return Address to add your information to the upper left corner. This information is pulled from Clinic Defaults
- Edit the name and address
- Font attributes
- Patient name and address are editable
- Any changes in Printer setup

To utilize **labels** you will need to purchase and install a Dymo LabelWriter 400 Turbo. Please note that other label equipment cannot be guaranteed to work from within PMP.

Once installed, checkmark the Dymo option located in **Computer Defaults** under the **Setup** menu.



All information in the Address to Print box can be edited, Patient number, x-ray information, date, etc. can be added to the label.

Click the LabelMaker icon to produce a label.

Related Patients

Related Patients will allow you to link family members or multiple files for the same patient so that payments can be made for all outstanding accounts. This is set up in Patient Information Personal tab. Double click on each patient you wish to relate. Click **Continue**.

Select a list of Patients for ALL Doctors

Patient List

Search: Basinger, Matthew

Number	Surname	First
1265	Barlow	Rhonda Dianne
771	Barnes	Gary
66	Basinger	Andrew
509	Basinger	Dave
692	Basinger	Donna
1148	Basinger	Matthew
841	Bates	Isabel
229	Baxter	Caren
480	Baxter	Darcy Michael
933	Baxter	John Keith
1023	Baxter	Lauren Elizabeth

Add Selected to 'Selected Patients'

Selected Patients

Number	Name
66	Basinger, Andrew
692	Basinger, Donna
1148	Basinger, Matthew

Fill the List using Patient Query

Delete Selected from the List

Delete the entire List

Continue

Select patients by using the Search box and pressing Enter, or use the Up and Down arrow keys and press Enter or Double Click on a patient. The Patients are sorted in the order shown by the yellow background in the Title Bar. Click on another column to change the sort order.

Once Related Patients have been set up you will see a pop up during activity posting that details outstanding accounts.

Related Patients

Number	Name	Balance
66	Basinger, Andrew	20.00
692	Basinger, Donna	0.00
1148	Basinger, Matthew	30.00

50.00

Continue

Pay related patient balances including today's billings by clicking the radio button next to Related Balance. Do not use the related balance function if anyone in the group has a credit balance.

Patient Activity

Treating Doctor: Dr. D.D. Palmer, DC

Location: Main Clinic

Code	Description	Total	OHIP/wsb	Patient
A	Adjustment	30.00	0.00	30.00

Delete Row: No Default

Payment Amount:

Amount: 0.00

None: 0.00

Today's Fees: 30.00

Account Balance: 30.00

Related Balance: 90.00

Preset Payment: 0.00

Dr. No. 1: 30.00

Pay this Amount: \$80.00

Payment Type: Balance

Print Receipt: ☐

Print Statement: ☐

Last Statement Date: 01-Feb-1998

Post

From here you can press F10 to Post

When choosing to print statements for related balances the statements will print for all related patients receiving part of the payment.

Pop Ups

Pop Ups are information boxes that will appear on a patient file where and when you choose, stating information you have input and may require about this patient or their appointment. Patient pop ups are created in the Patient Information Pop Ups tab.

The option of when and where pop ups appear is selected in the **Setup** menu, **Clinic Defaults**. → See **page 10**.

To Add Pop Ups get into the Patient Information file and click the **Pop Ups** tab.

Click **Add**.

To choose when you would like the Pop Up to appear, click the button number of your choice. You will need to edit the date for items **2**, **3**, and **4**, and add in a number for items **5** and **6**.

Pop Up When Options:

1. Will pop every time until deleted.
2. Will pop only on the chosen date. If the patient file is not accessed that day the Pop will be deleted.
3. Will pop only once, the first time the patient is accessed on or after the date chosen.
4. Will pop only that week for as many times as the patient is accessed.
5. This pop up pops only after **X** number of visits have been posted. **Note:** Items from the Fee Schedule listed under Inventory or Other are not considered visits.
6. This pop up will appear every time after the date chosen until the new month starts and reoccurs every subsequent month until it is deleted.

Once you have selected the appropriate choice click **OK**. Click into the **Pop Up Comment** box and type the comment you would like to appear. You may type up to 5 lines of text for each pop up.

To choose a default pop up comment click onto the comment of choice from the list on the right and click **Copy Selected**. The default comment will copy into the **Pop Up Comment** box. Click **Save**.

Edit Comments

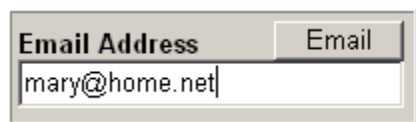
Comments in Patient Information can be edited, highlighted, and formatted for more visibility when processing. You can also print the patient comment.

Once you have created the comment click **Edit**. An edit screen will appear. Determine the area you wish to highlight by click and drag. Click the highlighter icon. Click the **X** to close. You will be asked if you wish to save your changes, click **Yes**.

The highlighted and / or edited portions will appear on the **Patient Summary Information** screen.

Active Email

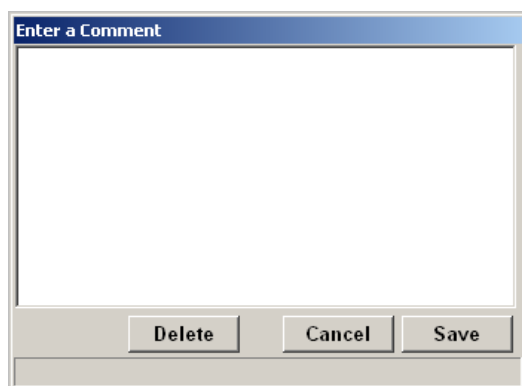
PMP will open your messaging program and address emails to your patients if you have internet capability on your computer. Enter the patient email address and click the **Email** button in Patient Information / Personal to activate this feature.

A screenshot of a software form titled "Email Address". It features a text input field containing the email address "mary@home.net" and a button labeled "Email" to its right.

Edit Activity Comments

When you post or edit an activity that requires an explanation, you can add a comment to the transaction.

On the Patient Information / Account Activity tab click the activity where you would like to add a comment. Click **Edit Comment**. A comment screen will appear allowing you to type a comment. Type a comment that describes the activity process. Click **Save**.

A screenshot of a dialog box titled "Enter a Comment". It has a large, empty text area for typing a comment. At the bottom of the dialog, there are three buttons: "Delete", "Cancel", and "Save".

Once an activity comments has been added to an activity a checkmark will appear in the second column.

Manitoba Health Services Commission

It is important to understand how Manitoba Health (MH) works in the province of Manitoba. The following is a summary of the components of MH structure.

The Manitoba Government utilizes a method of billing fees for chiropractic services called TWO-TIER BILLING. This means that in Manitoba, the Province will pay a PORTION of the fee for chiropractic services. The REMAINDER of the fee is the direct responsibility of the patient.

The government agency under which fees are paid is the Manitoba Health Services Commission (MH). For residents of Manitoba the rules are as follows:

- Each patient is entitled to charge fees for chiropractic care to MH for up to 12 visits per year. The billable amount is \$10.75 per visit. The fiscal year runs from January to December.
- Once the patient has reached the allowable amount, they are personally responsible for fees for services, until the commencement of the new MH fiscal year.
- MH will not pay for a claim if submitted more than 6 months after the treatment date.
- If a claim is rejected by WCB or MPI you have 6 months from the service date to submit to MH.

General Information

MH has set down rules that apply to codes and fees for services rendered in a chiropractic office. All treatments including examination are billed to MH with the code 8506 and fee of \$10.75.

When entering patient data into PMP it is important to consider:

- Correct fees are entered into the fee schedule in the program and are kept current with any changes.
- MH fees are correctly entered in the program, and updated when necessary.
- The Patient is listed as the correct type in the program. (ie. MH, MPI, WCB)
- The Manitoba Health Number (6 digits) is correctly recorded in the patient file. (Make sure you look at the card yourself when a new patient arrives. This procedure alone will help keep your accounts receivable to a minimum.)
- Surname & given name in the program are exactly the same as it appears on the Manitoba Health Card.
- Specific data is required for claims submission to MH. Missing data will result in a claim being rejected. This may cause a delay in payment. The data required to submit a MH claim is as follows:
 - Health number
 - Service code for each visit
 - Fee submitted for each visit
 - Service date
 - MH Diagnostic code
- MH billing may be submitted daily, weekly or bi-weekly. The deadline date for submission varies each month. All cut-off dates are posted on the EPiCS message board and are also issued at the beginning of each calendar year. If you are unsure please check with your MH office.
- Understanding the process of billing and reconciliation will help you monitor your accounts accurately. Follow through with the step by step billing, handling rejections and reconciliation procedure to minimize your accounts receivable and maintain MH account control.

Manitoba Health Billing

Once activity has been processed in patient files where MH fees are applicable you will want to create a billing to Manitoba Health.

Go to the **Manitoba** menu, Prepare **MH Billing Exchange**. Click the radio button next to the type of billing you wish to produce.

- **All Pending Claims** will pull all MH claims that have not been previously billed or that have been marked back to pending for resubmission.
- **Pending Claims by Period** will pull all MH claims that have not been previously billed or that have been marked back to pending for resubmission between specified dates.
- **Rebill Claims by Period** will pick up all claims whether pending or billed between specified dates.

Click **Run**.

The next screen contains information and reports regarding your submission.

- The **View Draft Rejection Journal** button, if enabled, will generate a draft report on your screen of all claims that are missing information and therefore will not be submitted. If the button is not enabled there are no rejected claims at this time.

The rejection journal will show a box around a field to indicate the problem is with that field. When the patient number has a box around it then it means the patient demographics are incorrect or missing. For example the address is missing or Rural Route is spelled R R. The address field requires a minimum of three characters.

March 23, 2006		Manitoba Health Rejection Journal		
		Dr. D.D. Palmer, DC		
Patient Name	Patient No.	Health Number	Birth Date	Diag. Code
Moore, Alicia	1536	919998		A14
Abrey, Sam	1546		04-May-1980	B14
Sisler, Rodney	80084		04-May-1980	B14
			03-Jan-1941	A14

- The **View Draft Claim Journal** button will generate a draft report on your screen of all claims being submitted.

Click any of these buttons to produce the report for viewing or printing.

Click **Cancel** to cancel this submission if you want to fix rejected claims or delay this billing.

To continue click **Save and create Submission file**. An information box will appear noting the name and location of the submission. *Make note of this filename*, you will need it when sending claims through the EPiCS system. Click **OK**.

- The **View Rejection Journal** button will be enabled if there are rejections. Click this button to print the report.
- The **View Claim Journal** button will allow you to generate the billings report.

These reports will be stored in **Documents for Printing** under the **Report** menu and can be viewed or printed at a later time.

The **Rejection Journal** appears like this:

9. CJ_DD_Sep2006_1.Ace

The **Claim Journal** appears like this:

39. RB_DD_Jan2005_1.Ace

Processing Manitoba Health Reconciliations

Manitoba Health sends you a payment file each month through the EPiCS program. Download the file and run it in PMP to pay individual claims and update your Accounts Receivable.

After you have downloaded the payment file from MH go to the **Manitoba** menu, **Reconcile MH Remittance File**. Click **Choose a Returns File**. Locate and select the Remittance file by clicking the down arrow beside **Look in**. Click **Open**.

- Click **View Returns File** to view the reconciliation.
- Click **Process File** to apply the reconciliation. Click **OK** after the payment has been applied.
- Click **View MH Payment Journal** to print the payment journal.
- Click **View MH Rejection Journal** to print the rejection journal.

These reports will be stored in **Documents for Printing** under the **Report** menu and can be viewed or printed at a later time. The Payment Journal is named 'MH_ PJ' followed by the creation date.

Click **Continue**.

Handling On Screen Rejections during Reconciliation

If MH has rejected any claims a screen will appear entitled 'Handle Rejections'. Decisions will be required regarding each rejection. The rejection code you choose will determine the action that is taken.

Three options are available to deal with the rejections:

1. **Transfer to Patient**
2. **Transfer to Patient & Write Off**
3. **Rebill the Claim**

You may either press the numbers **1, 2, 3** on your keyboard or click the box below the title selections on the top right of the screen.

For example: if the code is 01 - MH Number not valid, you will choose. **# 3. Rebill** if you are able to correct the claim.

✓ **Hint:** When in doubt choose Rebill. You can always re-submit or pay the claim once you understand the reason for the rejection. A complete list of **Manitoba Health Disposal Codes** is available in the Appendix at the back of this workbook.

A check mark will appear in the box where you have clicked or pressed. When all rejections have been handled, click **Finish**.

Click **View MH Payment Rejection Journal** to print the report. This report will be stored in **Documents for Printing** under the **Report** menu and can be viewed or printed at a later time. The Payment Rejection Journal is named 'MH_ PRJ' followed by the creation date.

Click **Continue**.

Dealing with No Payment Recorded

After processing the payment file you may notice the words **No Payment Recorded (NPR)** listed in the midst of patients name on the MH Payment Journal. What this means is that PMP was unable to locate the claim listed above the NPR to mark the payment. There are a few different reasons that this may happen.

1. The claim was deleted after it was submitted to MH. This type of claim will be displayed on the Payment Journal exactly the same as the one above and will have fee submitted 10.50 and fee paid 10.50.

Claim Number	Health Number	Patient Name	Patient No.	Service Date	Service Code	Amount Submitted	Amount Paid	Failed / Pending
000000082	123456	WILLIS, JEAN	0000879	20-Feb-2008	8506	10.50	10.50	Pending
000000082	NO PAYMENT RECORDED : this claim was not found in PMPw.							

You will need to notify MH that a wrong claim was paid and follow their direction. You may also need to manually pay the correct claim.

2. The claim was previously paid. On the Payment Journal it will appear without a fee submitted and will not have a patient name listed above. The disposal code is 03 – Duplicate Account – claim previously processed.

00001200	NO PAYMENT RECORDED : this claim was not found in PMPw.							
00001200	Disposal Codes: 03 - 03							

To find the patient this claim belongs to you will need to locate the Manitoba Health Claim Journal that contains the submission. Follow the column 'Claim Number' to locate the claim, in this case claim number 1200.

This type of NPR would signify that the claim was listed as a No Payment Recorded on a previous Payment Journal. The claim will need to be paid manually if found on a previous claim journal as paid. See below.

Claim Number	Health Number	Patient Name	Patient No.	Service Date	Service Code	Amount Submitted	Amount Paid	Failed / Pending
00001200	111300	ABRAHAM , DAN	0005000	03-Apr-2008	8506	10.50	10.50	

Manitoba Public Insurance

"Manitoba Public Insurance is a nonprofit Crown Corporation that has provided basic automobile coverage since 1971. Services are available through 22 claim centers, two Customer Service centers in 13 locations across Manitoba, and ten Driver and Vehicle Licensing (DVL) outlets. DVL services are also available through 147 agents in 123 communities, including 100 photo licensing agencies, and mobile testing units that service 69 communities. A staff complement of more than 1,600 strong makes MPI one of the largest employers in the province."

This information was taken from the Manitoba Public Insurance website at www.mpi.mb.ca/.

Set Up an MPI Patient

In Patient Information:

- on the **Personal** tab

Patient Type	MPI
Patient Category	as appropriate
Default Code	Adjustment
A/R Type	EHC
Send Statements To	EHC
- on the **EHC** tab:

input all information of the Insurer
- on the **Manitoba / MPI** tab:

input **Claim #**, **Accident Date**, **Adjuster**, and **Diagnosis**

Posting Transactions for MPI Patients

When posting activity for the MPI patient you can select the same activity as you would for a regular patient if your fee schedule is set up correctly. All transactions for treatments should have MPI codes and fees attached and will show \$0.00 under the Patient column.

Patient Activity				
Treating Doctor				
Dr. D.D. Palmer, DC				
Location				
Main Clinic				
Code	Description	Total	Billing	Patient
SUB	Subsequent Visit	26.54	26.54	0.00
*				

Reports and inventory items billable to MPI should be added to Fee Schedule Inventory. Report fees can be billed at completion of Form creation (see next section) or billed separately. When you choose to bill reports separately you are prompted to choose the form you are billing for from a list of forms created for this patient. This procedure will apply the form number to the invoice billing.

If you do not have any forms created within PMP type the number located at the top right of the form you are filling out into the field to the left of the **OK** button.

Form Type	Form No.	Date Created	Date Saved	Comments
Track I Report	E	10/18/2006	18/12/2006	

Either type in a form number, or click in the grid to select one.

A new requirement from MPI is that the form number be quoted on the invoice.

This number is editable at a later time by clicking the **+** sign on the account activity line.

Date	Ref. Date	Doc	Location	Code	Bill Code	Type	Status	Paid by	Billing	Patient	Payment
29/07/2005		DD	1	1ST	8506	MPI	Billed		18.56	0.00	0.00
01/08/2005		DD	1	SUB	8506	MPI	Billed		26.54	0.00	0.00
05/08/2005		DD	1	SUB	8506	MPI	Billed		26.54	0.00	0.00
22/08/2005		DD	1	SUB	8506	MPI	Billed		26.54	0.00	0.00
15/12/2006		DD	1	PIL	IP	MPI	Billed		48.00	0.00	0.00
15/12/2006		DD	1	MPA	MPA	MPI	Billed		42.44	0.00	0.00

Inventory items offer you the option of billing the patient or MPI during posting if both patient and MPI fees are set up for the item in the fee schedule.

Confirm

This Inventory item has both a patient fee and an MPI fee.
 You may charge this to either the patient or MPI. Do you wish to charge MPI?

Manitoba Public Insurance Forms

When you have a patient in your office where Manitoba Public Insurance (MPI) will be the payor you are required to complete an 'Initial Health Care Report' and later a 'Health Care Provider Progress Report'. PMP makes completing these reports quick and easy.

To create the reports you will need to get into Patient Information on the Manitoba tab and go to the MPI section.

Patient Information 3 - Sue Smith

Personal | Comments | Pop Ups | Manitoba | Bill To / Employer | Appointments | Account / Activity | EHC

Manitoba Health | MPI | WCB

Claim Number: 234567890
 Accident Date: 04/09/2005
 Adjuster (Case Manager): Bill Smith
 Area X-Rayed:
 Diagnosis: head hurts

Form Type	Form No.	Date Created	Doctor	Draft/Final	Comments
Initial Report		18/10/2005		Draft (can edit)	Need exam findings, LJ

If you wish to discuss this patient with an MPI Health Care Services member, Please phone 985-7395

Last name | Number | First name | Other | Continue

Press F2 to add an appointment, or press F10 to process an activity

The MPI screen contains some basic fields that will be 'pulled' into the reports you create. There are buttons for the 3 types of reports available for MPI patients; **New Initial Chiropractic Report**, **New Track I Report**, and **New Track II Report**.

Below the report buttons is a list of 'Finalized' and 'Draft' forms. As each report is created it will be listed in this area along with any comments you wish to add to the report.

- The **Edit Comment** button will allow you to add comments to a form after
- The **Edit Form** button allows a 'Draft' form to be edited. 'Finalized' forms cannot be edited.
- **View / Print** will open the Ace Viewer and display your form in the required format.
- The **Delete 'Draft' Form** button allows you to delete 'Drafts'. 'Finalized' forms can not be edited or deleted.

Creating a Form

Check that the **Patient Information - Personal** area has been completed first as this information will be 'pulled' into the form.

Input the Claim Number, Accident Date, Adjuster if known, Area X-Rayed, and Diagnosis. This information will also be pulled into the form.

Click **New Initial Chiropractic Report**.

There are three parts to this form. Each part is separated in the tabs across the top. They will all need to be completed to 'finalize' the form.

Along the bottom of the form are buttons for **Test Form**, **Cancel**, **Save as Draft**, and **Save as Finalized (unalterable)**.

- **Test Form** when pressed will highlight required fields in yellow and marks a red 'X' on incomplete parts of the form
- **Cancel** closes the form without saving and brings the user back to the MPI screen
- **Save as Draft** will save all information input so far allowing you to edit or complete the form at a later time
- **Save as Finalized (unalterable)** saves the form in an unchangeable format. Use this button only when you are sure all the information is complete and correct.

Click into empty fields to input required data. Click onto each part along the top to continue filling out the form. Click **Test Form**.

MPI Initial Chiropractic Report

✓ Part 1 | ✗ Part 2 | ✓ Part 3

Physical Findings:
Here are the findings:

Current Neurologic Examination:
☒ **Normal** ☐ Sensory ☐ Motor ☐ Reflex
 If abnormal, list deficits (include side) Cutaneous Territory Muscles (Grade /5) Levels (Grade /2+)

In the 5 years prior to the collision, did the patient:
☐ 1. Take time off work > 4 because of a previous injury or health problem?
☐ 2. Use prescription or OTC medications on a regular basis?
☐ 3. Experience any significant health problems requiring ongoing care?
☐ 4. Receive any chiro or physio Sessions? If yes, list date of last treatment
☐ 5. Experience any problems with anxiety, depression or substance abuse?

Test Form **Cancel** **Save as 'Draft'** **Save as 'Finalized' (unalterable)**

1 fields need to be corrected

Areas of the form requiring data before completion will be marked with a red 'X' at the top and the fields required will be highlighted in yellow.

If you are unable to complete the form at this time due to lack of time or information click **Save as Draft**.

The form will now be saved as a 'Draft (can edit)' on the main MPI screen in Patient Information. Click **Edit Comments**. Type a comment. Click **OK**.

The comment will now be added to the form.

Patient Information - 3 - Sue Smith

Personal | Comments | Pop Ups | Manitoba | Bill To / Employer | Appointments | Account / Activity | EHC

Manitoba Health | MPI | WCB

Claim Number: 234567890 **Accident Date:** 14/09/2005 **Adjuster (Case Manager):** Bill Smith

Area X-Rayed: **Diagnosis:** head hurts

New Initial Chiropractic Report **New Track I Report** **New Track II Report**

Form Type	Form No.	Date Created	Doctor	Draft Final	Comments
New Initial Report	15/11/2006	DD	Draft (can edit)	Need exam findings. LJ	

Edit Comments **Edit Form** **View / Print Form** **Delete 'Draft' Form**

If you wish to discuss this patient with an MPI Health Care Services member, Please phone 985-7395

Next **Previous** **Save** **Cancel** **New Patient** **Search for a Patient by** **Last name** **Number** **First name** **Other** **Continue**

Press F2 to add an appointment, or press F10 to process an activity

Editing a Form

Once you are ready to complete the report click the required form, **Edit Form**. The report will open allowing you to complete the form. Fill in missing information. Click **Save as Draft**. Click the required form, **View / Print**. Print the report and double check or have your doctor check for accuracy.

Finalizing a Form

When you are satisfied that the form is complete click the required form and **Edit Form**. The report will open allowing you complete the form. Click **Save as Finalized (unalterable)**.

Automatic Form Billing in PMP

Upon 'Finalizing' a form you will be asked whether you would like to create an activity to bill for the form.

If you choose to add the report charge, a transaction will appear on the Account/Activity tab in Patient Information.

Patient Information 3 - Sue Smith											
Personal Comments Pop Ups Manitoba Bill To / Employer Appointments Account / Activity EHC											
Date	Ref. Date	Doc	Location	Code	Bill Code	Type	Status	Paid by	Billing	Patient	Payment
29/07/2005		DD	1	1ST	8506	MPI	Pending		18.56	0.00	0.00
01/08/2005		DD	1	SUB	8506	MPI	Pending		26.54	0.00	0.00
05/08/2005		DD	1	SUB	8506	MPI	Pending		26.54	0.00	0.00
22/08/2005		DD	1	SUB	8506	MPI	Pending		26.54	0.00	0.00
15/11/2006		DD	1	MPA	MPA	MPI	Pending	B	42.44	0.00	0.00



Note: Track I and Track II forms include a 'Yellow Flags' field on Part 3. When checked, PMP will add a billing of 5.00 to the activity if you choose to add the report charge at 'Finalization'

Here is a completed form.

		INITIAL CHIROPRACTIC REPORT		D 000100	
Patient/Guardian: Sue Smith		Given Name: Sue Smith		Age: 56	
Date of this examination: 05/04/10		Date of Collection: 05/04/10		Care Manager: Walked Walk	
SYMPTOMS: Use primary complaints and their current status.					
1. Headache	NPS	/10	4.	NPS	/10
2. Neck pain	NPS	/10	5.	NPS	/10
3. Shoulder pain	NPS	/10	7.	NPS	/10
4. Back pain	NPS	/10	8.	NPS	/10
PHYSICAL FINDINGS: How I sit putting in my find signs:					
CURRENT NEUROLOGIC EXAMINATION: <input type="checkbox"/> Normal <input type="checkbox"/> Sensory <input type="checkbox"/> Motor <input type="checkbox"/> Reflex Cerebellar: Throat key Muscles: (Grade 1-5) Levels: (Grade 1-2)					
IN THE YEAR PRIOR TO THE COLLISION DID THE PATIENT: <input type="checkbox"/> Yes <input type="checkbox"/> No 1. Take time off work - 4 weeks because of a previous injury or health problem? 2. Use prescription or OTC medications on a regular basis? 3. Experience any significant problems requiring ongoing care? 4. Receive any chiropractic or physiotherapy services? If yes, list date of last treatment. 5. Experience any problems with anxiety, depression or substance abuse?					
PHYSICIAN'S ASSESSMENT: For each complaint 1. Whiplash 6. 2. 6. 3. 7. 4. 8.					
MANAGEMENT PLAN: 1. Is there indication that back II can be reversed? <input type="checkbox"/> Yes <input type="checkbox"/> No 2. Use prescription splints or other assistive devices: 3. Detail requirements for the above devices: 4. Has a referral been made to another health care practitioner? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, when?					
WORK STATUS: Occupation: Process <input type="checkbox"/> Yes <input type="checkbox"/> No 1. Is the patient currently at work? If no indicate date of return date (05/01) 2. Will a return to work adversely affect the nature (history) of the condition? 3. Does the condition preclude travel to and from the workplace? 4. Does the condition result in an inability to perform required tasks? 5. Does the condition pose a safety/hazard risk to the patient or co-workers?					
IDENTITY OF THE PRACTITIONER: Surname: Dr. J.A. Fraser, D.C. Given Name: MPIC Registered Account# 14 Address: (Number, Street, Apt. No.) Location: Avenue City: Winnipeg Prov: Manitoba P.Code: R4B 1W4 Tel: 204 629-8211 Fax:					
Though this report is essential, the patient must be advised that MPIC will not be compensated for the release of this report.					
Signature of Practitioner				Date (YYYYMMDD)	
Signature of Patient or Guardian				Date (YYYYMMDD)	

Posting Manitoba Public Insurance Activity

Fee Schedule items, when set up correctly, will appear with MPI billings and show up accurately on MPI invoices. When adding or setting up MPI billings in your fee schedule make sure to have the appropriate code and fee filled in. For items that are required to be listed under the heading Description add them to your Inventory in Fee Schedule. Note that Initial Visits and X-rays appear in Description when added to **Fee Classes**.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	No. Services	FEE					
																															0	0.00					
Description																				Date (dd/mm/yyyy)																	
Pillow																				15/12/2006																	48.00
Initial Chiropractic Report D000101																				15/12/2006																	42.44

Billing Manitoba Public Insurance

Go to the **Manitoba** menu, **Prepare Manitoba Public Insurance (MPI) Billing**. Click the radio button next to the type of billing you wish to produce.

- **All Pending Claims** will pull all MH claims that have not been previously billed or that have been marked back to pending for resubmission.
- **Pending Claims by Period** will pull all MH claims that have not been previously billed or that have been marked back to pending for resubmission between specified dates.
- **Rebill Claims by Period** will pick up all claims whether pending or billed between specified dates. Click **Run**.

The next screen contains information and reports regarding your claims.

- The **View Draft Report** button will generate a draft report on your screen of all claims being submitted with this billing.
- The **View Draft Invoices** button will generate the draft invoices that are to be submitted to MPI.

Click these buttons to produce the report for viewing or printing.

To proceed with the billing click **Save and Print INVOICES**. The **View Report** button will now be enabled. Click this button to print the report.

These reports will be stored in **Documents for Printing** under the **Report** menu and can be viewed or printed at a later time. The MPI Claim Journal is named MPI_CJ followed by the creation date. The Invoices are named MPI_Inv followed by the creation date.

Manitoba Public Insurance Reconciliation

Go to the **Manitoba** menu, **Record Manual Payments**. Click **MPI**, Choose a doctor and click **Prepare the Report for this Doctor**.

Record Manual MPI payments for Dr. D.D. Palmer, DC

Patients

Search

Number **Surname** **First**

1 White Snow
2 Charming Prince
3 Smith Sue
4 Duck Daffy
5 White Lilly
6 Mouse Mickey
7 Charming King
8 Duck Donald
9 Wolf Bad
10 Riding Red
11 O'Brien Alana

Activity

Date	Ref. Date	Code	Billing	Status	Submitted
29-Jul-2005		1ST	9506	Pending	18.56
01-Aug-2005		SUB	9506	Pending	26.54
06-Aug-2005		SUB	9506	Pending	26.54
22-Aug-2005		SUB	9506	Pending	26.54
15-Nov-2006		MPA	MPA	Pending	42.44

Change in MPI 0.00

Finish

Select a patient by clicking onto the **Number**, **Surname**, or **First** button and typing information into the Search field. Click the patient name.

A list of claims will appear on the right side of the screen. Click the first claim to pay. Click **Pay <-> UnPay** and **Accept Changes**. The status of the claim will change to paid. Continue with each claim to pay.

Locate the next patient to pay claims for in the same manner. Click **Finish** when you have paid all claims. A report will appear on screen detailing the payments. Print the report at this time or you may print it later. It will be stored in **Documents for Printing** under the **Report** Menu. The Payment Journal is named 'MPI' followed by the doctor code and creation date. Click **Close**.

MPI Write Offs

To write off stale dated MPI claims click the **Manitoba** menu, **Record Manual Payments**, **MPI**. Choose the practitioner; click **Prepare the report for this Doctor**. Locate the patient by clicking **Number**, **Surname**, or **First** and typing the search information into the **Search** field. Click the first visit you wish to write off under **Activity**.

Click into the **Current Line** amount box after selecting the date and type **0.00** into the amount field. Click **Accept Changes**. Click **2. TTP & WO**.

Click **Finish** when all claims to be written off have been handled. Print the Payment Journal.

Worker's Compensation Board

General Information

The Worker's Compensation Board (WCB) has a fax-based reporting and billing process for healthcare providers. Instead of mailing reports, healthcare providers can fill out the form on paper or online and send them to the WCB by fax.

Fax in Winnipeg: 954-4999 Fax outside of Winnipeg: 1-877-872-3804

When a claim is rejected by WCB you have 6 months from the service date to bill Manitoba Health for the claim. You will need to edit the claims.

Set Up a WCB Patient

In Patient Information:

- on the **Personal** tab

Patient Type	WCB
Patient Category	as appropriate
Default Code	Adjustment
A/R Type	Bill To
Send Statements To	Bill To
- on the **Bill To / Employers** tab:
input all information of the Insurer
- on the **Manitoba / WCB** tab:
input **Claim #**, **Accident Date**, **Adjuster**, and **Diagnosis**

Posting Transactions for WCB Patients

When posting activity for the WCB patient you can select the same activity as you would for a regular patient if your fee schedule is set up correctly. All transactions for treatments should have WCB codes and fees attached and will \$0.00 under the Patient column.

The screenshot shows a window titled "Patient Activity". It contains a "Treating Doctor" dropdown menu with "Dr. D.D. Palmer, DC" selected, and a "Location" dropdown menu with "Main Clinic" selected. Below these is a table with the following data:

Code	Description	Total	Billing	Patient
SUB	Subsequent Visit	29.64	29.64	0.00
*				

Reports and inventory items billable to WCB should be added to Fee Schedule Inventory.

Inventory items offer you the option of billing the patient or WCB during posting if both patient and WCB fees are set up for the item in the fee schedule.

The screenshot shows a "Confirm" dialog box with a question mark icon. The text inside reads: "This Inventory item has both a patient fee and an MPI fee. You may charge this to either the patient or MPI. Do you wish to charge MPI?". There are two buttons at the bottom: "Yes" and "No".

Worker's Compensation Board Forms

If you have a patient in your office where Worker's Compensation Board (WCB) will be the payor you will be required to complete a 'Chiropractor's First Report' and later a 'Chiropractor's Progress Report'. PMP makes completing these reports quick and easy.

To create the reports, you will need to get into **Patient Information** on the **Manitoba** tab and go to the **WCB** tab.

Patient Information - 2 - Peter Smith

Personal | Comments | Pop Ups | Manitoba | Bill To / Employer | Appointments | Account / Activity | EHC

Manitoba Health | MPI | WCB

Claim Number: 32456734 Accident Date: 04-Jul-2005 First Treatment: 06-Jul-2005 Adjuster: Bill Smith

☐ X-Ray Taken? Area X-Rayed: Diagnosis: Acute Cervical Strain

Employer (as used on the Invoice): School Board Winnipeg

New Chiropractor's First Report New Chiropractor's Progress Report

Form Type	Date Created	Doctor	Draft/Final	Comments
Initial Report	18/10/2005		Draft (can edit)	Needs exam findings, LJ

Buttons: Edit Comments, Edit Form, View / Print Form, Delete 'Draft' Form

Search for a Patient by: Last name, Number, First name, Other

Press F2 to add an appointment, or press F10 to process an activity

The WCB screen contains some basic fields that will be 'pulled' into the reports you create. There are 2 types of reports available for WCB patients; **New Chiropractor's First Report**, and **New Chiropractor's Progress Report**.

Below the report buttons is a list of 'Finalized' and 'Draft' forms. As each report is created it will be listed in this area along with any comments you wish to add to the report.

- < The **Edit Comment** button will allow you to add comments to a form after
- < The **Edit Form** button allows a 'Draft' form to be edited. 'Finalized' forms cannot be edited.
- < **View / Print** will open the Ace Viewer and display your form in the required format.
- < The **Delete 'Draft' Form** button allows you to delete 'Drafts'. 'Finalized' forms can not be edited or deleted.

Creating a Form

Check that the **Patient Information - Personal** area has been completed first as this information will be 'pulled' into the form.

Input the Claim Number, Accident Date, Adjuster if known, Area X-Rayed, and Diagnosis. This information will also be pulled into the form.

Click **New Chiropractor's First Report**.

There are three parts to this form. Each part is separated in the tabs across the top. They will all need to be completed to 'finalize' the form.

Along the bottom of the form are buttons for **Test Form**, **Cancel**, **Save as Draft**, and **Save as Finalized (unalterable)**.

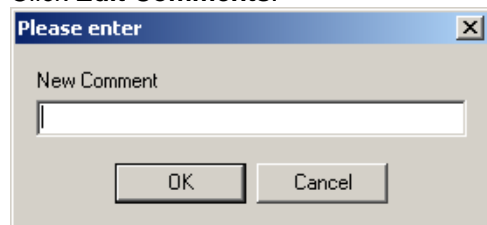
- **Test Form** when pressed will highlight required fields in yellow and marks a red 'X' on incomplete parts of the form
- **Cancel** closes the form without saving and brings the user back to the MPI screen
- **Save as Draft** will save all information input so far allowing you to edit or complete the form at a later time
- **Save as Finalized (unalterable)** saves the form in an unchangeable format. Use this button only when you are sure all the information is complete and correct.

Click into empty fields to input required data. Click onto each part along the top to continue filling out the form. Click **Test Form**.

Parts of the form that are not completed will be marked with a red 'X' and the fields required will be highlighted in yellow.

If you are unable to complete the form at this time due to lack of time or information click **Save as Draft**. The form will now be saved as a 'Draft (can edit)' on the main WCB screen in Patient Information.

Click **Edit Comments**.



Type a comment. Click **OK**.

Form Type	Date Created	Doctor	Draft/Final	Comments
▶ Initial Report	15/11/2006	DD	Draft (can edit)	Needs diagnostic details. LJ

The comment will now be added to the form.

Editing a Form

Once you have the missing information and / or time to complete the report click the required form and **Edit Form**. The report will open allowing you to complete the form.

When all fields have been finished click **Save as Draft**. Click the required form and **View / Print**. Print the report, double check and/or have your doctor check for accuracy.

Finalizing a Form


When you are satisfied that the form is complete click the required form and **Edit Form**. The report will open. Click **Save as Finalized (unalterable)**. Click the required form and **View / Print**. Print the report.

You may wish to add a comment at this time regarding the completion or mailing date. Click **Edit Comments**. Type a comment and click **OK**.

The comment will now be added to the form.

Form Type	Date Created	Doctor	Draft/Final	Comments
▶ Initial Report	15/11/2006	DD	Final	Faxed Oct 10/06. LJ

Below is a completed form.

 Workers Compensation Board of Manitoba Please FAX this form IMMEDIATELY Winnipeg: 954-4999 Toll free: 1-877-872-3804		CHIROPRACTOR'S FIRST REPORT Claim No. 32456734	
Worker Information Last Name: Smith First Name: Peter Address: 22 Any Drive City: Winnipeg Province: MB Postal Code: R5E 3W5 Telephone No.: 204-255-8899 Sex: M Height: 187 Weight: 202 Date of Birth: 25/10/1962 Job Title: Teacher		Employer Information Name: Lumber Inc. Address: 123 Hard Luck Street City: Winnipeg Province: MB Postal Code: R2W 3E4	
Injury Details Date of Accident: 04/07/2005 Initial Area of Injury: back Workers description of accident/injury: Lumber fall on foot Examination Findings & Diagnosis: Date of Examination: 18/09/2006 Diagnosis: Acute Cervical Strain Subjective Complaint: (Type in text) Objective Findings (include ROM, muscle testing & neurological status): (Type in text) Tests performed (e.g., MRI): (Type in text) Location: (Type in text) Date: (Type in text) Category of injury (please check one): Spinal: <input checked="" type="checkbox"/> Symptomatic <input type="checkbox"/> Loss of stability <input type="checkbox"/> Complicated <input type="checkbox"/> Extremity: <input type="checkbox"/> Symptomatic <input type="checkbox"/> Loss of stability <input type="checkbox"/> Complicated <input type="checkbox"/> Possible Supporting Category: <input type="checkbox"/> Multiple Injuries to same site <input type="checkbox"/> Age over 65 <input type="checkbox"/> Other			
Treatment Plan Type, frequency, and duration: <input type="checkbox"/> Active Intervention (freq: 0, times: 0, days: 0) <input type="checkbox"/> Passive Rehab (freq: 0, times: 0, days: 0) <input type="checkbox"/> Other (freq: 0, times: 0, days: 0) Date of next visit: (Type in text) Work Capabilities: Will worker be capable of doing the date of accident or a restriction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If no, enter date when able to return to regular duties) (Type in text) Is worker capable of full duty or modified work? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If no, enter restrictions) (Type in text) Duration of restriction: 0 weeks			
Chiropractor Information Chiropractor Name: Dr. D.D. Palmer, D.C. Telephone No.: 204-552-8211 Fax No.: Address: 45 Saccharine Avenue Chiropractor Signature: (Type in text) Date: (Type in text) City: Winnipeg Province: Manitoba Postal Code: R4B 1W4			

WCB Form 0001 (05/05)

Fax This Form Winnipeg: 954-4999
Toll Free: 1-877-872-3804

Worker's Compensation Board Billing

Go to the **Manitoba** menu, **Prepare Worker's Compensation Board of Manitoba (WCB) Billing**. Click the radio button next to the type of billing you wish to produce.

- **All Pending Claims** will pull all MH claims that have not been previously billed or that have been marked back to pending for resubmission.
- **Pending Claims by Period** will pull all MH claims that have not been previously billed or that have been marked back to pending for resubmission between specified dates.
- **Rebill Claims by Period** will pick up all claims whether pending or billed between specified dates.

Click **Run**.

The next screen contains information and reports regarding your claims.

- The **View Draft Report** button will generate a draft report on your screen of all claims being submitted with this billing.
- The **View Draft Invoices** button will generate draft invoices that are to be submitted to MPI.

Click these buttons to produce the report for viewing or printing.

To proceed with the billing click **Save and Print INVOICES**. The **View Report** button will now be enabled. Click this button to print the report.

These reports will be stored in **Documents for Printing** under the **Report** menu and can be viewed or printed at a later time. The WCB Claim Journal is named WCB_CJ followed by the creation date. The Invoices are named WCB_Inv followed by the creation date.

Click **Finished**.

Worker's Compensation Board Reconciliation

Go to the **Manitoba** menu, **Record Manual Payments**. Click **WCB**, Choose a doctor and click **Prepare the Report for this Doctor**.

Record Manual WCB payments for Dr. D.D. Palmer, DC

Patients

Search

Number	Surname	First
1	White	Snow
2	Smith	Peter
3	Smith	Sue
4	Duck	Duffy
5	White	Lilly
6	Mouse	Mickey
7	Charming	King
8	Duck	Donald
9	Wolf	Bad
10	Riding	Red
11	O'Brien	Alana

H.C.N.
0000000000

S.I.N.

Activity

Date	Ref. Date	Code	Billing	Status	Submitted
06-Jul-2005		1ST	8506	Pending	25.38
08-Jul-2005		SUB	8506	Pending	25.38
13-Jul-2005		SUB	8506	Pending	25.38
15-Jul-2005		SUB	8506	Pending	25.38
18-Jul-2005		SUB	8506	Pending	25.38
20-Jul-2005		SUB	8506	Pending	25.38
25-Jul-2005		SUB	8506	Pending	25.38
29-Jul-2005		SUB	8506	Pending	25.38
21-Oct-2005		SUB	8506	Pending	25.38

Current Line

06-Jul-2005 SUB 8506 Pending 25.38

Pay <-> UnPay

Cancel Accept Changes

Click a transaction to Pay or UnPay a claim.

Change in WCB 0.00

Finish

Select a patient by clicking onto the **Number**, **Surname**, or **First** button and typing information into the Search field. Click the patient name.

A list of claims will appear on the right side of the screen. Click the first claim to pay. Click **Pay <-> UnPay** and **Accept Changes**. The status of the claim will change to paid. Continue with each claim to pay.

Locate the next patient to pay claims for in the same manner. Click **Finish** when you have paid all claims. A report will appear on screen detailing the payments. Print the report at this time or you may print it later. It will be stored in **Documents for Printing** under the **Report** Menu. The Payment Journal is named 'WMP' followed by the doctor code and creation date. Click **Close**.

WCB Write Offs

To write off stale dated WCB claims click the **Manitoba** menu, **Record Manual Payments**, **WCB**. Choose the practitioner; click **Prepare the report for this Doctor**. Locate the patient by clicking **Number**, **Surname**, or **First** and typing the search information into the **Search** field. Click the first visit you wish to write off under **Activity**.

Click into the **Current Line** amount box after selecting the date and type **0.00** into the amount field. Click **Accept Changes**. Click **2. TTP & WO**.

Click **Finish** when all claims to be written off have been handled. Print the WCB Payment Journal.

Reports

Summary Sheets

PMP Summary sheets are easy to read and include detailed information regarding the period you request. Pressing **F4** while on a particular Appointment Book will activate a **Daily Summary Sheet** for that practitioner for the date on the appointment book. Summary sheets can also be accessed from the **Report** Menu and offer choices of Daily, Weekly, Monthly, Quarterly, and Yearly. Reports can be produced for individual practitioners, grouped by the entire clinic, or grouped by the practitioners listed on the appointment book currently in use. Daily summary sheets can be sorted by patient name, patient number, the order patients were posted in, or the activity code. Choose the order under **Reports, Summary Sheet**, and **Daily**. Click **Run the Report** to make the selected option the default.

Reading the Daily Summary Sheet

The first part of the Daily Summary Sheet details individual patient information regarding all financial transactions as well as next appointment information.

Wed, 15 Nov 2006		Daily Report - Dr. D.D. Palmer, DC										Location - ALL		Page No. 1
Patient Name	Number	Dr.R	Dr.T	Loc.	Code	Pd. by	Paid	Patient	MH	Other	Next Appointment	Referred By		
Smith, Sue	3	DD	DD	1	MPA			0.00	(MPI)	42.44	21-Oct-2005 9:30 AM	Confirmed	Paul Bunyan	
Willey, J. Bruce	80102	AB	DD	1	ACU	CHEK	40.00	40.00						
Smith, Barbara	131	DD	DD	1	SUB			0.00	(MPI)	26.54	15-Nov-2006 9:00 AM	Confirmed		
Hornby, Alexis Margery	25	DD	DD	1	SUB	CASH	40.00	30.00			15-Nov-2006 9:00 AM	Confirmed		
				1	ICE			10.00			15-Nov-2006 9:00 AM	Confirmed		
Brisbin, Barry	141	DD	DD	1	SUB			0.00	(WCB)	25.38	22-Nov-2006 9:00 AM	Confirmed		
Reid, Shara L	1363	DD	DD	1	CON	DBT	55.00	55.00			22-Nov-2006 9:00 AM	Confirmed		

Dr.R indicates the doctor of record for this patient.

Dr.T indicates the practitioner who treated the patient.

Loc. Indicates the office location. (Note this field may not be active)

Code is the Fee Schedule code given for this item

The columns **Patient**, **MH**, and **WCB** indicate the billing amount to that payor.

The last page of the daily summary sheet is the same as all of the other summary sheets including the monthly, weekly, quarterly and yearly. For further details see below.

Reading the Last Page of PMP Summary Sheets

All PMP Summary Sheets offer the same information on the last page. The only difference is in the totals due to the reporting period you choose. Understanding the details, totals, and how PMP gets those totals will help you make decisions and complete statistical reports. Look at the last page of your summary sheet:

Sat, 24 Mar 2007		Daily Report - Dr. D.D. Palmer, DC		Location - ALL Page No. 2	
Receipts		Claims and Fees		Patient Categories	
Patient Payments Received		Patient Fees	170.00	Adult	3
American Express	0.00	Inventory Fees	0.00	Student	1
Cash	0.00	H.S.T.	0.00	Child	0
Cheque	0.00	P.S.T.	0.00	No Charge	0
Debit Card	0.00	Total Inventory Fees	0.00	Senior	1
Gift Certificate	0.00	Discounts	0.00	Compassionate 1	0
Insurance Cheque	0.00	Write Offs	0.00	Compassionate 2	0
MasterCard	30.00	MH Claims	0.00	Compassionate 3	0
Visa	10.00	WCB Claims	19.26	Family member	0
Category 9	0.00		0.00	Unused	0
Category 10	0.00	MPI Claims	0.00	Unused	0
Other	0.00		0.00	Unused	0
		⑤ Total Fees Charged	189.26	Unused	0
Total Patient Payments	40.00			Unused	0
M. Health Payments Posted	0.00	Rescheduled	1	Unused	0
WCB Payments Posted	0.00	Postponed	0	Unused	0
	0.00	Missed	1	Unused	0
MPI Payments Posted	0.00	Cancelled	0	Unused	0
Total Payments Received	40.00				
⑥ Doctor of Record		AR as of Thursday, 12-Apr-2007		① Total Patients Seen	
Dr. D.D. Palmer, DC	70.00	Patient	3605.22	② Subsequent Visit Claims	
Dr. Benjamin Pierce, DC	119.26	Bill To	20.00	③ New Patient Claims	
		EHC	9072.17	④ Re-examination Claims	
			240.00		
		3rd Party	9332.17	Total Visit Claims	
		MPI		8	
		WCB	2178.00	X-ray Claims	
		MH	0.00	0	
		Total AR	15115.39	Total Claims	
				8	
				STARTING CASH	
				PAYMENTS RECEIVED	
				BANK DEPOSIT	
				CASH IN+OUT-	
				ENDING CASH	

If you are trying to balance your receipts with your summary sheet look for the field **Total Patient Payments**. Also shown in the first column is **Doctor of Record**. This indicates the breakdown of fees generated by practitioners treating other doctor's patients.

- ① **Total Patients Seen** refers to the number of *individual* patients who have been treated during the reporting period. *For instance, on your yearly summary sheet a patient who is adjusted once a month will count as 1 Total Patients Seen and 12 Subsequent Visits.*
- ② **Subsequent Visit Claims** refers to the total number of transactions posted from your treatment fee schedule. By dividing the Total Visit Claims by Total Patients Seen you are now able to calculate the average number of patient visits. This is a statistic that many management consultants utilize.
- ③ **New Patient Claims** is an important statistic and accuracy depends on two factors:
 - The transaction posted to the new patient must be from your **Fee** Classes listed as an Initial Visit Code.
 - The date that this transaction is posted must be the patient's first visit date. Confirm the date by referring to the field **First Visit Date** on the **Appointments** tab in **Patient Information**.

If the transaction does not meet both the above criteria, a new patient will not be recorded.
- ④ **Re-examination Claims** are counted when a transaction is posted from your **Fee Schedule, Treatment**, has a **WSIB Code** of **V103**, and the transaction date is NOT the same as the patient's **First Visit Date**.
- ⑤ **Total Fees Charged** represents the total billings for the practitioner(s) on the summary sheet. It is the total revenue for the practitioner(s) who gave the treatment. Offices with multiple practitioners who

treat each other's patients are able to break this total down to show whose patients were treated by using the Doctor of Record amounts.

- 6 Doctor of Record.** The Doctor of Record breakdown represents the revenue earned by treating patients belonging to various practitioners. The total fees under Doctor of Record amounts will always equal the **Total Fees Charged**.

In looking at the screen shot, note that:

- Dr. D.D. Palmer treated patients for a **Total Fees Charged** amount of \$189.26
- The **Doctor of Record** amount for Dr. D.D. Palmer is \$70.00
- The **Doctor of Record** amount for Dr. B. Pierce is \$119.26

That means that Dr. D.D. Palmer earned \$70.00 from treating his own patients and he earned \$119.26 from treating Dr. Pierce's patients. These amounts can be useful when practitioners pay a percentage or amount when treating other practitioner's patients.

This breakdown is not available for offices that have multiple patient files for the same patient.



Note: Accounts Receivable is an option on summary sheets. Turning AR on or off is chosen under the **Setup** menu, **Doctor Defaults**.

Show AR Totals on Summary Sheet ☒

Statements

Statements can be pulled:

- 1) individually from within the Patient Information Account Activity screen
 - 2) individually while posting activity
 - 3) grouped for related patients while posting activity
 - 4) individually or grouped from the Report menu.
- 1) From within the Patient Information Account Activity screen click the Statement button. Determine the start and end dates by clicking the down arrow under Date From and Date To. The Date from is defaulted from the date selected under the **Setup** menu, **Clinic Defaults**.

Print transactions for specific practitioners only by check marking Include activity ONLY from these Doctors and then checking the appropriate practitioners.

Use the default letterhead determined in **Use Blank Paper** or select another by clicking **Choose**. The option **Use Letterhead** will print onto custom made pre-printed letterhead.

Choose to add a comment by typing directly into the **Comments to print on statements** field or select one by double clicking onto the appropriate comment under **Select a Comment**. The comments are created under the **Setup** menu, **Statement Comments**.

Prepare Statement for Addressed List

Date From: 01/01/2008 Date To: 20/11/2009

Sort by: ☒ Surname ☐ Number

☒ Update Last Statement Date

☐ Include activity ONLY from these Doctors

Interest: ☒ No Interest Charges ☐ Charge Interest (%)

Letter Head: ☒ Use Blank Paper ☐ Use LetterHead

☐ Show OHIP expiration on Statement

Comments to print on statements

To put comments on the Statements, you may use a combination of typing into the "Comments to print on statements", or double click on an item in the grid "Select a Comment".

Report Destination: ☒ Screen ☐ Printer ☐ Export to RTF ☐ Save to File

Select a Comment:

- Fee Increase
- Holidays
- Provincial Licence #
- Prompt Payment

The Report Destination will send the statement:

- to the **Screen**, this option will update the Last Statement Date. Uncheck the field *Update Last Statements Date* if you do not want the date updated.
- to the **Printer**, this option **will** update the Last Statement Date
- Export to RTF** will create the report as a 'rich text format' available for opening in word processors
- Save to File** will save the report ready for exporting

- 2) Individually while posting activity. To print a statement during posting check mark the **Print Statement** box before clicking **Post**.

Patient Activity

Treating Doctor: Dr. D.D. Palmer, DC

Location: Main Clinic

Code	Description	Total	Billing	Patient
SUB	Subsequent Visit	16.00	0.00	16.00

Default Code: No Default

Delete Row

Payment Amount: ☒ Amount 0.00 ☐ None 0.00 ☒ Today's Fees 16.00 ☐ Account Balance 16.00 ☐ Related Balance 0.00 ☐ Preset Payment 0.00 ☐ Dr. No. 1 -4.00

Pay this Amount: \$16.00

Payment Type: Cheque

Print Receipt: ☐

Print Statement: ☒

Last Statement Date:

The default start date will be next day after the last statement end date. If there is no previous statement date the start date will default to the date set up in Clinic Defaults. The end date will default to today's date. These dates can be edited by clicking the down arrow and choosing another date on the calendar. Change the month and/or year by clicking onto the month or year on at the top of the calendar and choosing another date from the list. You can also type the dates into the Date From and Date To fields as dd/mm/yy. The statement date field in Patient Information on the Account/Activity tab will be updated after Posting.

Select a Range of Dates

Date From: 03/04/2006 Date To: 22/11/2006

The Default LetterHead will be used.

- 3) Grouped for related patients while posting activity. This option is similar to above except statements will be printed for all 'related patients' paid when the Related Balance option is selected under Payment Amount.

The screenshot shows the 'Patient Activity' window for Dr. D.D. Palmer, DC. It displays a table with columns: Code, Description, Total, Billing, and Patient. The first row is 'SUB Subsequent Visit' with values 16.00, 0.00, and 16.00. Below the table, there are sections for 'Payment Amount' and 'Payment Type'. The 'Payment Amount' section has radio buttons for 'Amount', 'None', 'Today's Fees', 'Account Balance', 'Related Balance' (selected), 'Preset Payment', and 'Dr. No. 1'. The 'Payment Type' section has a dropdown menu set to 'Cash'. There are also checkboxes for 'Print Receipt' and 'Print Statement', and a 'Last Statement Date' field set to '07-Mar-1998'. A 'Post' button is at the bottom right.

- 4) Individually or grouped from the Report menu. Choose the **Report** menu, **Statements, List of Patients**. Select the practitioner and click **Prepare the report for this Doctor**. Click on **Number, Surname** or **First** to search for patients by that field. Click into the Search box after choosing the search type and type the name or number. Double clicking or pressing **Enter** after the patient is highlighted or clicking **Add Selected** will copy that patient into the Selected Patients box.

The screenshot shows the 'Patient List' window for Dr. D.D. Palmer, DC. It has a 'Search' box and a list of patients with columns 'Number', 'Surname', and 'First'. The first patient is '742 Abraham Enn'. Below the list, there are buttons for 'Add Selected to "Selected Patients"', 'Fill the List using Patient Query', 'Delete Selected from the List', and 'Delete the entire List'. A 'Continue' button is at the bottom right. A small text box at the bottom explains how to use the search box and list.

By choosing **Fill the List using Patient Query** you can choose patients by other criteria. Click **Continue**. In the **Prepare Statements for** screen select options in the same manner as for item #1 from within the Patient Information Account Activity screen.

Appointment Book

The Appointment Book printout gives a printed version of the day's appointments. It is convenient for practitioners who want to have a copy of their day.

Print the appointment book by clicking the **Report** menu, **Reminders / Recalls, Appointment Book**.

The screenshot shows the 'Print the Appointment Book' window. It has a 'From' date field set to '20/11/2009'. There are three main sections: 'Range of Time to Include' with radio buttons for 'All Day' and 'Partial Day'; 'Appointment Type Colours' with radio buttons for 'Print' and 'Don't Print'; and 'Appointment Shading' with radio buttons for 'Print' and 'Don't Print'. Below these are 'Report Destination' (Screen, Printer), 'Colour Options' (Colour, Black & White), and 'Page Format' (Portrait (Normal), Landscape). A 'Print the Appointment Book' button is at the bottom right.

Choose the date and times. Clicking **Partial Day** will allow you the option to input a time range. **Appointment Type Colours** will include the appointment colours associated with each appointment. Choose **Colour Options** if you have a colour printer. Click **Print the Appointment Book**.

Wed, 4 Nov 2009

Daniel David Palmer, DC #4444

Page 1

Exam				
8:00am	Eva MacKlin	Edna MacLean	Amy Love	Wayne Johnston
8:10		Brenda Lloyd	Mary Lou Robinson	Katerina Kelly
8:20				
8:30				
8:40		Brent Ysinga	Ryan Boland	
8:50				
9:00am				
9:10		Judith Lynnd		
9:20				
9:30		Susanne Sedgwick		
9:40		Eric Clement		Alfred Austin
9:50		Logan Ebsen	Paul Holmes	Maxwell Wilson
10:00am		Floyd March		
10:10				
10:20				
10:30	John Ralph			
10:40				
10:50				
11:00am				

**Note:**

This report will print with invalid appointments 'hidden' if you have selected this option in Doctor Defaults or if you have named columns.

Reminder List

The reminder list provides a list of appointments that may require reminders or other types of calls. This report is a good tool for reminding patients of future appointments. Choose the **Report** menu, **Reminder / Recalls**, **Reminder List**. The date defaults to today, edit it to reflect tomorrow or the next business day. Click the radio button next to **Unconfirmed Appointments**. Click **Run the Report**.

Reminder List
SQL Version
Choose a Doctor
Daniel David Palmer, DC #4444
Select a Date
20/11/2009
☐ Exclude 'Do NOT contact'
Select a Group of Appointment Status's
☒ All Appointments
☐ Unconfirmed Appointments
☐ Unconfirmed and Confirmed Appointments
☐ Missed, Postponed and Resch. and Cancelled A
Report Destination
☒ Screen
☐ Printer
Run the Re

Sat, February 04, 2006
Reminder List
Dr. D.D. Palmer, DC
Page Number 1

Time	Status	Comments	Name	Number	Home Phone	Business	Est.	No. Visits	OHP	Leads	Flags
9:15 AM	Unconfirmed		Tallot, Mildred Emma	1180	(416) 245-1891	(416) 630-2719		2	150.00		
11:15 AM	Unconfirmed		Aldridge, Elmer	723	(905) 428-7517	(905) 737-8966		20	150.00		
11:30 AM	Unconfirmed		Sage, Brett Scott	197	0 663-7797			130	150.00		
11:45 AM	Unconfirmed		Choiniere, Alexander	17	(416) 590-0063	(416) 223-0523		98	150.00		
1:30 PM	Unconfirmed		Sage, Alan	8	0 398-7151	0 338-8437		25	150.00		
3:00 PM	Unconfirmed		Kubay, Alan	6	(905) 567-7567	(905) 897-1210		48	147.90		
3:30 PM	Unconfirmed		Ainsworth, Julie	80106	(416) 481-6770	(416) 496-0975		0	150.00		
4:30 PM	Unconfirmed		Graves, Alexander	13	(905) 731-1510	0 225-2777		37	150.00	REL	
5:30 PM	Unconfirmed		Bilcox, Alexandre	21	(905) 838-0942	(905) 678-9831		86	150.00	S	

Total Number of Appointments : 9

**Hint:**

This report is also a good report to take home when you are expecting inclement weather. Print **All Appointments** for this procedure.

Recall Lists

PMP offers Past Due and Long Term Recall Lists.

- The **Past Due Recall List** is a record of all incomplete appointments such as missed and postponed appointments.
- The **Long Term Recall List** is a record of patients that have no future appointments scheduled. Cancelled appointments go to the Long Term Recall List.

Past Due Recall List

The past due recall list is a list of all incomplete appointments. Used in conjunction with the long term recall list, they provide an accurate catalogue of patients. Utilizing the Past Due Recall list on a daily basis can assist you in ensuring your patients do not 'fall through the cracks'.

You can also use the list to move patients onto the Long Term Recall List.

Access the Past Due Recall List by clicking the **Patient** menu, **View Past Due Recall List**. Choose the practitioner and click **View Past Due Recall List for this Doctor**.

Next Appointment	Next A. Status	Active	Name	Phone	Work	Ext.	Last Visit
16-Oct-2006 9:45 AM	Missed	<input type="checkbox"/>	Pedlar, Sandi	(204) 783-6368	(204) 789-0406		24-Jan-2003
16-Oct-2006 11:00 AM	Missed	<input type="checkbox"/>	Abrey, Sam	(204) 730-9727	(204) 222-3434		
16-Oct-2006 11:30 AM	Postponed	<input type="checkbox"/>	Tapscott, Simon Ali	(204) 633-5128	(204) 928-1212	227	30-Jan-1999
16-Oct-2006 2:00 PM	Postponed	<input type="checkbox"/>	Charming, Prince	(204) 484-8349	(204) 229-0060		20-Oct-2002

Filter the List
☐ Show All Patients ☒ Only Active Patients ☐ Only Inactive Patients
☐ Exclude 'Do NOT contact'

Select a Patient by Double clicking on the appropriate Row.

OK

Double click the patient's name; you will be taken into the patient's appointment file.

- Add a new appointment by clicking **Add an Appointment**.
- Move a patient to the Long Term Recall List by clicking **Clear Date**

Click **Continue**. You will be taken back to the Past Due Recall List. The patient whose appointment was booked or moved is no longer on the Past Due Recall list.

To print a paper version of the Past Due Recall list click the **Report** menu, **Reminders /Recalls, Past Due Recall List**. Select the correct practitioner and click **Print Past Due Recall List for this Doctor**. Click **Run the Report**.

The Long Term Recall List

Access the Long Term Recall List by clicking the **Report** menu, **Reminders /Recalls, Long Term Recall List**. Select the correct practitioner and click **Print Long Term Recall List for this Doctor**. Input the dates you want for this report, click **Run the Report**.

Print Long Term Recall List of Dr. D.D. Palmer, DC

Date: 16/09/2006 To: 16/10/2006

☐ Exclude 'Do NOT contact'

Report Options:
☒ Show Active And Inactive
☐ Show Active Only
☐ Show Inactive Only

Report Destination:
☒ Screen ☐ Printer

Run the Report

Accounts Receivable

Accounts Receivable reports can be produced for

- Patients
- Bill To
- EHC
- WCB
- MPI
- MH

✓ **Hint:** To have patients appear on the correct Accounts Receivable Report enter the correct **AR Type** in Patient Information, Personal Tab. If this field is not entered correctly the patient may appear on an incorrect Accounts Receivable report.

To print Accounts Receivable for Patients click the **Reports** menu, **Accounts Receivable, Patient**. Select the appropriate practitioner, **Prepare Accounts Receivable for this Doctor**.

Click the down arrow under **Period Ending** and click onto the back or forward arrow once for every month you wish to move back or forward. You can also click onto the month or year to produce a list of months or years. Click onto the day on the calendar. Choose where to send the report by clicking the radio button under **Report Destination**. Click **Run the Report**

Wed, 18 Oct 2006					Patient Accounts Receivable - Dr. D.D. Palmer, DC			Page No. 8	
Period Ending : 18-Oct-2006									
Patient	Name	Home Phone	Business Phone	Ext.	Last Payment	Last Statement	Last Visit	Next Visit	
1595	Varcoe, Elisabeth	512-6181			26-Apr-2000		28-Apr-2000	31-Oct-2003	
				Aged :	0.00	0.00	0.00	175.00	
1539	Wade, Ian	882-4962	375-1236				27-Jan-2000	175.00	
				Aged :	0.00	0.00	0.00	17.00	
159	Wellwood, Betty Anne	638-9553				08-Mar-2000	24-Feb-2004	80.00	
				Aged :	0.00	0.00	0.00	80.00	
168	West, Blake Joseph	485-7524	865-0191	323		09-Apr-2000	14-Apr-2000	51.11	
				Aged :	0.00	0.00	0.00	51.11	
1530	Winkworth, Paulette	636-9443				22-Jan-2000	24-Feb-2004	145.10	
				Aged :	0.00	0.00	0.00	145.10	
34	Wright, Alida	742-4274			19-Oct-2005	02-May-2000	19-Apr-2006	30.00	
				Aged :	0.00	0.00	0.00	30.00	
194	Ysinga, Brent	241-7152				06-Nov-1999	14-Apr-2000	54.00	
				Aged :	0.00	0.00	0.00	54.00	
					-1610.63	115.00	210.00	5077.31	
								3791.61	
					Aged : 0-30 days	31-60 days	61-90 days	over 90	
								Bal. Due	

Patient Query by Doctor or Office

Various types of information may be derived from selecting items in this report, such as New Patient Lists, Birthday Lists, etc. These reports can be sorted by Number, Surname or Birthday and contain your choice of customized information from the patient file.

Boxes must be checked to the left of the criteria options and to the left of the selected alphabetical fields in order to produce the required report.

Patient Query for the Office

Click on any Checkbox to include that Criteria in the Report

List of Doctors (Drs. of R.) ☐ Select Doctors ☐ "Do not Contact" is checkmarked
☐ ☐ "Do not Contact" is NOT checkmarked

List of Treating Doctors ☐ Select Doctors ☐ City (partial)
☐ ☐ Patient Type

☐ Activity
☐ Activity Date >= 16/12/2009
☐ Activity Date <= 16/12/2009
☐ Patient No. >=
☐ Patient No. <=
☐ Preferred Location

☐ Only Males
☐ Only Females
☐ Age >=
☐ Age <=
☐ Birthday, month >= 16/12/2009
☐ Birthday, month <= 16/12/2009
☐ Patient Category

☐ Referral Method
☐ Referred By
☐ Balance Due >=
☐ Balance Due <=
☐ Patient is on AR
☐ Patient is NOT on AR
☐ Statements go to
☐ Statements do NOT go to
☐ Flag

Sorted By
☒ Patient No.
☐ Surname
☐ Birthday
☐ Postal Code

Report Destination
☒ Screen ☐ Printer ☐ Export to RTF ☐ Save to File

Query Customization

The criteria fields you select will determine which patients are included on the report; for example your new patients, birthday patients etc. Once you have selected the criteria for your query click **Customize**. Now you are able to select what information about these patients to include on the report by check marking the boxes in the right hand column. These items will appear in the middle column entitled **MY Fields (Ordered)**. Change the order of the fields by clicking the red arrows to the right of the items.

Once all items are selected and ordered you can choose to save this query for future use. For example, if you do a monthly New Patient report with referrals you can set the fields up once, save them, then retrieve them whenever necessary. Click **Save Field List**. Type the name of the file in the box to the right of **File Name**, click **Save**. Your file is now saved in the Report Directory. You may retrieve it for future query customization by clicking the **Load Field List** button.

Click **Run the Report MY way**.

Wednesday, 18 October 2006		Patient Query for all the Doctors		
Criteria : First Visit >= 01-Sep-2006, First Visit <= 30-Sep-2006				
Name	Phone	Referred By	First Visit Date	Next Visit Date
Ron Walker	878-5214	Yellow Pages Ad	01/09/2006	
Ron Woods	555-8989	Staff Referral	01/09/2006	
Joe Abraham	222-1111	Sophie Anne Abraham	06/09/2006	
Total Number of Patients in Query 3			Balance Due = 0.00	

Labels

You may print Mailing Labels from within the PMP. Click the **Report** menu, **Mailing Labels**. Choose **Select Patients Individually**. Choose a practitioner and click **Run the Report for this Doctor**.

There are two ways to select patients individually:

1. **Number, Surname, or First**
2. **Fill the List Using Patient Query**

a. Number, Surname, or First

Click the button of choice for how to search for your patients. The selection will turn yellow. Click into the Search field. Start typing the first few letters or numbers. Double click or press Enter on the appropriate patients. Selected patients will appear on the right.

b. Fill the List Using Patient Query

The query area can now be utilized to pull patients that meet the criteria you select for labels. Once all required fields are checked click Accept. You will be returned to the Select a list of Patients' screen.

Click **Continue**, and then **OK**.

✓ **Hint:** If your labels are not positioned correctly on the sheet of labels you can increase or decrease the top margin. This is done under the Setup menu, **Clinic Defaults**, Mailing Labels. Increase the number to start the labels further down on the paper.

Fee History Report

The Fee History Report will generate a sales report of any item in your Fee Schedule: Treatment, Other or Inventory, e.g. a list of all patients who received Orthotics in a given period.

The report may be pulled in either of the following ways:

- **By Date**
- **By Patient**

Click the **Report** menu, **Fee History Report**. Select **By Date** or **By Patient**. Choose the practitioner; click **Run Report for this Doctor**.

Click the down arrow to the right of each field; select the dates and fee schedule item. Click **Run the Report**.

From: 01-Oct-2005		Dr. D.D. Palmer, DC: Fee History	
To: 18-Oct-2006		"OFA" : Orthotic Foot Appliance	
Date	Patient No.	Patient Name	Amount
17-Jan-2006	1313	Roger Murray	49.00
21-Jan-2006	1348	Sara Elizabeth Penne	475.00
28-Jan-2006	1218	Nicholas Hone	475.00
12-Mar-2006	1245	Wayne Edmond Perry	475.00
01-Apr-2006	1251	Paul Thomas Pink	475.00
07-May-2006	1567	Clarence Irish	475.00
07-Aug-2006	308	Cindy Jones	475.00
14-Sep-2006	818	Lucille Rylott	15.00
			<hr/> 2914.00
Total Number of Items		8	

Patient Referral Activity Report

The PMP will generate a report based on the referral source of your patients. The report shows the revenue generated from the referral source and it is subtotalled by patient. Click the **Report** menu, **Patient Referral Activity**. Choose a practitioner; click **Prepare the Report for this Doctor**.

Select the appropriate fields by clicking the down arrow to the right, then click **Run the Report**.

Period From: 24-Sep-2006		Dr. D.D. Palmer, DC		Page No. 1	
To: 24-Nov-2006		Referral Activity for - Dr. Jeffery Jones			
Pat. No.	Name	Service Date	Code	WCB	Patient Fees
				Pmt Rec'd	Charged
34	Alida Wright	21-Nov-2006	A	0.00	10.00
				0.00	10.00
159	Betty Anne Wellwood	21-Nov-2006	A	0.00	30.00
				0.00	30.00
742	Erin Abraham	21-Nov-2006	A	0.00	0.00
1124	Mary Brown	22-Nov-2006	A	0.00	30.00
				0.00	30.00
Totals				0.00	70.00

Exporting Documents

All reports that can be brought to the screen in PMP can be exported to other programs. This includes exporting to Adobe, Excel, Word Processors, and also formats of HTML and JPEG, to name a few. The uses of this feature are numerous; you can email statements and appointment calendars / lists to your patients, export financial reports to your accountant, and edit documents.

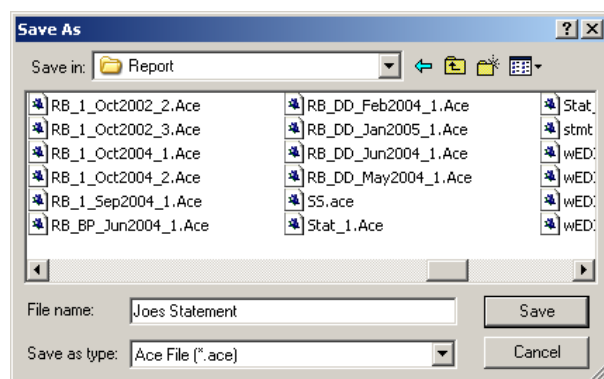
Create the Report

To export a report start by creating the report in the normal manner. When you see the **Report Destination** option, click **Save to File**.

Report Destination

☐ Screen
 ☐ Printer
 ☐ Export to RTF
 ☒ Save to File

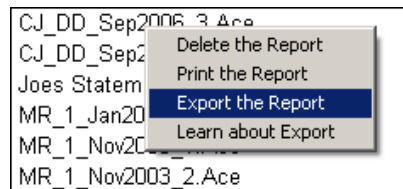
A Save As window will appear asking you for a name and location for the document. Type a name for the report. Click **Save**, click **Run the Report**.



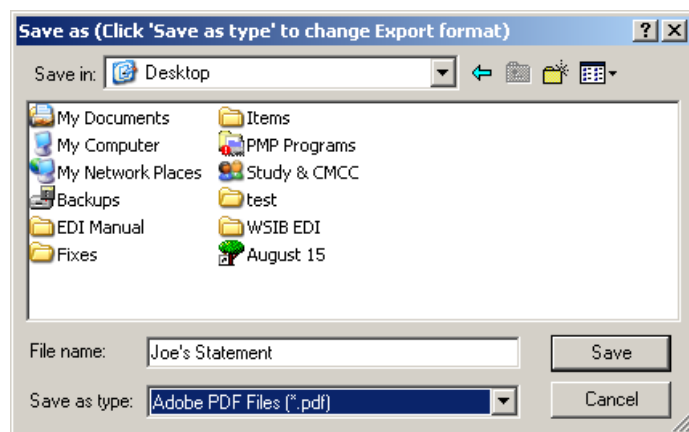
Note: If your report does not offer the option of **Save to File** bring your report/document to the screen. Once the report is visible on screen click the **File** menu followed by **Save**. Save the file to **C:\PMPw\Data\Report**. Type a name, click **Save**. Close the Ace Viewer and return to the Appointment Book.

Export the Report

Click Reports, Documents for Printing. Locate and right click the newly created file. Click the option Export the Report.



Choose a location for the file in the **Save in:** field and type a name in the **File name:** field. Choose the format by clicking the down arrow beside **Save as type:**. Click **Save**.



Make any changes and edits in the formatting screen and click OK. Your document will open in the associated program for the specified file type.

Export Formats

- *Adobe PDF Files (*.pdf)*
These will open on most computers in an unchangeable format. Good for emailing statements and appointment calendars / lists.
- *Rich Text Format (*.rtf)*
RTF's open in most word processors allowing you to edit documents.
- *Hyper Text Markup Language (*.htm)*
- *Extended Hyper Text Markup Language (*.htm)*
Both are used for web pages.
- *Microsoft Excel Workbook (*.xls)*
- *Quattro Pro for Windows (*.wb1)*
- *Lotus 1-2-3 (*.wk2)*
These are spreadsheet documents. Good for pulling accounts receivable and summary sheets into accounting software.
- *Windows Bitmap (*.bmp)*
- *JPEG File (*.jpg)*
- *Enhanced Metafiles (*.emf)*
- *Windows Metafiles (*.wmf)*
These are all picture type formats.

Create E-mail Distribution List from PMP

Follow these instructions to create a distribution list pulled from PMP for use with your messaging program.

Go to the **Utilities** menu, **Patient Export**. Click **Choose Criteria Using Query**. Checkmark **Has Email** at the bottom on the right (you will have to scroll to locate this option). Click **Accept**.

Choose **Select Fields**. Checkmark **Email address**, uncheck **Patient Number**. Click **Accept**.

Choose **Export to Comma Delimited**. Choose a location for the file in the **Save in:** field and type a name in the **File name:** field. Click **Save**.

On your desktop click **Start, Programs, Accessories, Notepad**. Click **File, Open**. Locate the file and click **Open**.

Go to the **Edit** menu and choose **Replace**. Insert " (quotation mark) into the field **Find what** and leave the **Replace** with field blank. This will delete all the quotation marks.

Click the **Edit** menu and choose **Select All**. Click the **File** menu then **Copy**.

Now you can **Paste** the email addresses into a group (distribution) email. We are not able to detail these instructions as there are many messaging programs but using **Contacts** or **Addresses** should help.

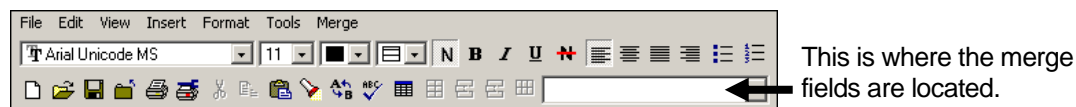
Merge Letters

Click **File, WordProcessor**. Select a Letterhead to use by clicking **Open, Template**, the appropriate letterhead. When the letterhead is open click **File, Save As**, and type the name of the merge letter. Click **Save**.

Change the justification using the **Left justification** icon.



Move your cursor to the desired location on your letter. Click **Merge, Patient Merge Fields, OK**.



Click appropriate fields under the down arrow such as **FI, Add, City**, etc. Remember to leave spaces between fields.



Hint: A list of merge codes is detailed on the following pages.

Continue preparing your letter, adding appropriate merge fields. To delete fields highlight the merge code and press the **Backspace** or **Delete** key on the keyboard. Save the completed letter.

When you are ready to merge click **Merge, Merge Patients Individually** or **Merge By Patient Query**.

Select a list of Patients for ALL Doctors

Patient List

Search

Number	Surname	First
742	Abraham	Erin
1623	Abraham	Joe
1386	Abraham	Sophie Anne
67	Abrey	Andrew
431	Abrey	Dale
1546	Abrey	Sam
1387	Abrey	Souglas Joseph
1389	Abrey	Stacey
1102	Adams	Margaret
1397	Adams	Mary
1444	Adriano-Closs	Todd

Add Selected to 'Selected Patients'

Selected Patients

Number	Name
--------	------

Fill the List using Patient Query

Deleted Selected from the List

Delete the entire List

Continue

Select patients by using the Search box and pressing Enter, or use the Up and Down arrow keys and press Enter or Double Click on a patient. The Patients are sorted in the order shown by the background in the Title Bar. Click on another column to change the sort order.

If you choose Merge by Patient Query select the appropriate criteria in the Query by check marking the boxes to the left of your choices. Once your selections are complete click **Continue**. Click **OK**.

Your letters will generate on screen. **Close**, **Print** and **Printer Setup** icon are in the top left of the screen. Page number and Next / Previous page icons are in the bottom right.

Print-Preview

75%

Palmer Wellness Centre
Dr. D. D. Palmer Reg #4444
123 Walnut Blvd. Winnipeg, Manitoba R2L 2Y2
204 629-8211 fax: 204 629-8214
email: betterhealth@yahoo.ca

June 16, 2008

Alan Berezneyi
1 Spirea Court
Downsview, ON, M3H 4N1

Dear Alan,

We would like to take this opportunity to welcome you as a patient and to thank you for choosing our clinic. It is our goal to assist you with all of your spinal health needs. We wish to make all your visits informative and rewarding.

Please take the time to read this informative literature, including information on Dr. Palmer, our office policies and the services we provide.

We encourage you to make a list of any questions you may have. You will find we are dedicated to excellence in patient care.

Looking forward to participating in your health care needs.

Sincerely,

Dr. D.D. Palmer and staff

75%

Utilizing the Merge Feature

The following are some ideas for using the merge function in the PMP WordPad.

- Change of Office Hours
- Notice of Fee Increase
- Thank you for referrals
- Notification of Missed Appointments
- Spinal Checks for Children
- Upcoming Information Sessions
- Congratulation letters
- Welcome letters
- Notice of new promotions
- Spinal Care Class Reminders
- Off Work letter
- Thank you Grams
- Recalls
- Collection letters
- Treatment Plans
- Christmas letter
- Orthotic letter
- Insurance letters
- Lawyer letters
- Discharge

Merge Codes

Action	Merge Code
Accident Date from WCB	%[acc_date]
Patient Active Check marked	%[Active]
Address	%[Add]
Total Balance	%[Bal_due]
Date Of Birth	%[Birth]
Bill To: Claim #	%[BT_ClaimNo]
Bill To: Code #	%[BT_Code]
Bill To: Contact From Patient	%[BT_Contact]
Bill To: File #	%[BT_FileNo]
Bill To: Phone From Pat. Info	%[BT_Phone]
Bill To: Policy #	%[BT_PolicyNo]
Health Card Expires on	%[Card_date]
Health Card Number	%[Card_no]
City	%[City]
WCB Claim #	%[Claim_No]
Country	%[Country]
Diagnostic Code	%[Diag_code]
Diagnostic Details	%[Diag_rem]
Doctor of Record	%[Doctor]
EHC Code	%[EHC1_Code]
EHC Contact	%[EHC1_Contact]
EHC Max \$	%EHC1_DolMax]
EHC Phone Extension	%EHC1_Ext]
EHC File #	%[EHC1_FileNo]
EHC First Day Coverage	%[EHC1_First Day]
EHC Fiscal Year	%EHC1_FiscalDate]
EHC # of visits to date	%EHC1_NoVisits]
EHC max # of visits payable	%EHC1_NoVisitsMax]
EHC Phone	%[EHC1_Phone]
EHC Policy #	%[EHC1_PolicyNo]
EHC Amount Remaining	%[EHC1_Remaining]
EHC Yearly Start Date	%[EHC1_StartDate]
EHC Max \$ Per Visit	%[EHC1_Visit]
Patient Email	%[Email]
Patient First Name	%[First]
Patient First and Last Names	%[FI]
Patient Flags	%[Flag]
First Visit Date	%[Fv_date]
Patient Middle Name	%[Init]
Last name followed by First	%[Lf]
Last Payment Amount	%[Lp_amt]

PATIENT MANAGEMENT PROGRAM

Action	Merge Code
Last Payment Date	%[L-_date]
Last Statement Date	%[Ls_date]
Last Visit Date	%[Lv_date]
Maiden Name	%[Maiden_Name]
Birth Month and Day	%[Mmdd]
MVA Accident date	%MVA_AccDate]
MVA Claim Number	%[MVA_ClaimNo]
MVA Company Code	%[MVA_Code]
MVA Contact	%[MVA_Contact]
MVA Phone Extention	%[MVA_Ext]
MVA File/Policy Number	%[MVA_FileNo]
MVA Allowable amount of visits	%[MVA_NoVisits]
MVA Phone number	%[MVA_Phone]
MVA 1 st Treatment Date	%[MVA_TreatDate]
Number of Visits	%[No_visit]
Next Visit Date & Time	%[Nv_datetime]
Next Visit Appt Status	%Nv_status]
Patient A/R type	%[OnAR]
Patient Category	%[Pat_cat]
Patient Number	%[Pat_no]
Patient Type	%[Patient_type]
Payment Type	%[Pay_type]
Patient 2 nd listed Phone #	%[Phone_2]
Patient 2 nd listed Extension #	%[Phone_2ext]
Name of 2 nd listed Phone #	%[Phone_2lab]
Patient 3 rd listed Phone #	%[Phone_3]
Patient 3 rd listed Extension	%[Phone_3ext]
Name of 3 rd listed Phone #	%[Phone_3lab]
Patient 4 th listed Phone #	%[Phone_4]
Patient 4 th listed Extension	%[Phone_4ext]
Name of 3 rd listed Phone #	%[Phone_4lab]
Patient Home Phone #	%[Phone_home]
Patient Postal Code	%[Post]
Preset billing amount	%[Preset]
Province	%[Province]
Referred By	%[Ref_by]
Referral Method	%[Ref_method]
Send Statements To:	%[SendTo]
Social Insurance #	%[Sin_no]
Auto Statement Y/N	%[Statement]
Patient Surname	%[Surname]
WCB 1 st Treatment Date	%[Tr_date]
X-Ray Remaining	%[Xray]

Security

Information

The PMP offers a security feature that allows or restricts access to menu items. PMP records edits, deletions, and balance changes that occur within the patient file. The security area records the user who performed the change.

The security feature is located under the File menu, **Security**. It contains Login, Profiles, Users, and Change Passwords.

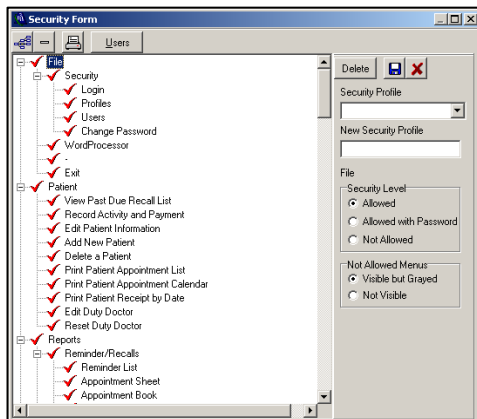
A profile named 'Rick' was included with your initial PMP. This profile allows access to all PMP features. You can continue to use this profile to signify 'full access' or delete it once a replacement has been made.



Note: You must do a PMP backup before continuing with this process.

Profile

The profile is how you permit or restrict access to menu items in the program. Create profiles for all PMP users to limit their access to certain PMP menu items.

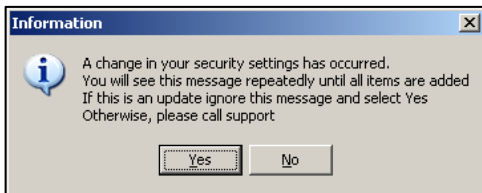


Click the **Expand Treeview**  icon to show the detailed PMP menus.

To create a new profile simply click on a menu item that you wish to control access to and choose Not Allowed on the right. Continue to control access for other items using the same procedure. Once you have completed selecting menu items for this profile type a name into the New Security Profile field. The name should be logical based on the level of security and not the user name, i.e., Part time staff or Office manager.



Click the **Save Security Profile** icon.



You will see a screen notifying you that changes have occurred. Click **Yes**. You may be required to click **Yes** repeatedly until all individual items have been changed. Click **OK** once you see the congratulations message. Your profile has now been saved.

To edit or view existing profiles click the down arrow under Security Profile. Click the profile you wish to edit or view.

✓ **Hint:** When limiting access for user profiles you should restrict access to the menu items of Users, Profiles, and Clinic Defaults. These areas allow users to alter their profiles. Only the 'Rick' or 'full access' profile should have these areas allowed.

Users

The Users screen is where you will find a list of individuals currently utilizing your PMP and where you add new users and assign profiles.

To add a new user click **Add**. Type the new users initials, first, and last name into the fields provided. Click the down arrow under **Profile**. Choose the profile appropriate for this user.

The screenshot shows the 'Login Id Form' window with a table of users. The table has columns: Init, First, Last, Profile, and Primary Doctor. The first row is 'LP Liz Pridham Rick'. The second row is 'RS Rick Sheibl Rick' and is highlighted.

Init	First	Last	Profile	Primary Doctor
LP	Liz	Pridham	Rick	
RS	Rick	Sheibl	Rick	

Note: The field User allowed access to these Doctors has been disabled and is not required.

Click **Save**.

To Edit a User click the users name and the **Edit** button. Make your changes and click **Save**.

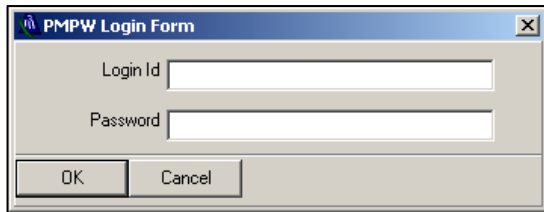
To Delete a User click the users name and the **Delete** button. Click **OK**. This user will no longer have access to PMP.

The screenshot shows the 'Login Id Form' window in 'Form' view. It has fields for Initials, First Name, Last Name, and Profile. Below these is a section for 'User allowed access to these Doctors' with a list of doctors: AB = Dr. Albert Schweizer, MT; BP = Dr. Benjamin Pierce, DC; DD = Dr. D.D. Palmer, DC; LH = Laurel Hardy, MT.


Note: When there is a change in office staff you should add and delete users as appropriate.

Login

The login screen allows you to switch users. The shortcut function key **F8** will open the login screen from the main appointment book.

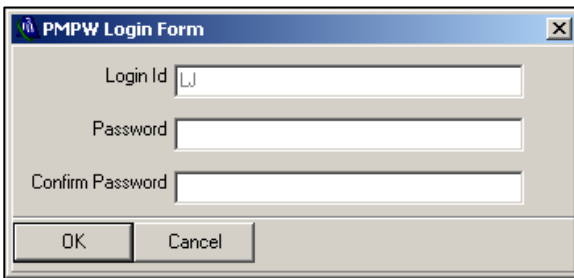
A screenshot of the 'PMPW Login Form' dialog box. It has a title bar with a close button. Inside, there are two text input fields: 'Login Id' and 'Password'. Below the fields are two buttons: 'OK' and 'Cancel'.

To logoff as a user but allow other users access to PMP, open the login screen. This permits the next user to login. If they click **Cancel** or close the login screen PMP will automatically close and must be reopened.

 **Note:** This feature protects all users from accessing menu items and modifying activity using another PMP User Id.

Creating or Changing Passwords

The Change Password area allows you to create a new password or change an existing password. To assign or change your password you must first be logged in as the user. Click **File, Security, Change Password**.

A screenshot of the 'PMPW Login Form' dialog box, which is used for changing a password. It has a title bar with a close button. Inside, there are three text input fields: 'Login Id' (containing 'LJ'), 'Password', and 'Confirm Password'. Below the fields are two buttons: 'OK' and 'Cancel'.

When you open the Change Password screen the users initials are already visible in the Login Id field. Type a password into the Password field. Repeat the password in the Confirm Password field. Click **OK**. The password for this login ID has now been changed.

 **Note:** Passwords are case sensitive.

Edit Date

One of the functions that PMP contains is the ability to restrict edits and deletions from happening in the patient account activity screen. The restrictions are limited by date. When activated, users will not be able to edit or delete transactions in patient files if the transaction date of the activity is before the date specified in 'Edit Date'.

The Edit Date aids in more accurate bookkeeping procedures and stops changes from happening within previous months without approval. Security should be setup to disable access to this area.

To setup the Edit Date go to the **Utilities** menu, **Edit Date**. Select the appropriate date on the calendar. Click **Accept Changes**.

Account Edit Journal

The Account Edit Journal records any edits, deletions and balance changes that are made in the patient Account Activity screen. It offers the choice of viewing the report by Service Date or Edit Date.

- *Service Date* will show the edits and deletions by the date of service.
- *Edit Date* shows the edits and deletions by the date the service was edited.

Balance changes are added to the list treating the editing date as the service date.

Click the **Reports** menu, **Account Edit Journal**, **by Patient**, **by Login ID**, or **by Date**.

- *by Patient* will produce the account edits and deletions for a specific patient
- *by Login ID* will produce the account edits and deletions created by a specific user
- *by Date* will produce the account edits and deletions done during a specified date range



Note: All users should be setup with individual logins in order for the Account Edit Journal to accurately reflect the user who performed the action.

This account edit journal was produced by Date, Editing Date.

Thu, 07-Dec-2006		Account Edit Journal - by Date							Page 91	
Service Dates from : 01-Apr-2000 to 07-Dec-2006										
Pat. No.	Doctor	Date	Code	Billing Code	Bill Type	Paid By	Status	Billing	Patient	Payment
18-Sep-2006 02:37 PM User *** Record Edit			Patient paid after posting. LJ							
Before	742	DD	19-Apr-2006	A	Cash		Paid	0.00	30.00	0.00
After	742	DD	19-Apr-2006	A	Cash	VISA	Paid	0.00	30.00	30.00
18-Sep-2006 02:39 PM User *** Record Delete			Posted to dad instead of son. LJ							
	431	DD	18-Sep-2006	A	Cash	CASH	Paid	0.00	30.00	30.00
18-Sep-2006 02:52 PM User *** Record Edit			Patient no longer WSIB. LJ							
Before	1621	DD	18-Sep-2006	A	V101	WSIB	Pending	19.26	0.00	0.00
After	1621	DD	18-Sep-2006	A	Cash		Paid	0.00	30.00	0.00
18-Sep-2006 03:01 PM User *** Balance Edit			Balance change as per Dr. DD's direction. LJ							
	1621	DD	The Balance Due is now \$0.00. Dr. "DD"s balance changed from 30.00 by -30.00 to \$0.00							

The first line shows the date and time that the change took place followed by the user that completed this transaction and the type of change. If a comment was added at the time of change it will appear following the transaction type.

18-Sep-2006 02:37 PM User *** Record Edit	Patient paid after posting. LJ
---	--------------------------------

The next two lines of an Edit explain how the transaction looked at posting, and how it looked after the edit. Areas that were altered are shown within boxes.

Before	742	DD	19-Apr-2006	A	Cash		Paid	0.00	30.00	0.00
After	742	DD	19-Apr-2006	A	Cash	VISA	Paid	0.00	30.00	30.00

The second line of a Delete shows the entire transaction that was deleted.

431	DD	18-Sep-2006	A	Cash	CASH	Paid	0.00	30.00	30.00
-----	----	-------------	---	------	------	------	------	-------	-------

A Balance Edit details any balance changes.

1621	DD	The Balance Due is now \$0.00. Dr. "DD"s balance changed from 30.00 by -30.00 to \$0.00								
------	----	---	--	--	--	--	--	--	--	--

Backup, Utilities and Housecleaning

Backup

Backup is one of the major problems users encounter. Faulty or non-existent backups can have devastating results. Hard drive crash, theft, fire and flood are just a few of the many reasons you may require your PMP backup to retrieve your patient and clinic history.

Backup Procedures

No matter what media type you are using for backups, floppy disk, CD, USB drive, etc, you should have more than one set. If you use the same object for every backup and that media fails or is lost you will not have any good, retrievable backups.

For this reason we suggest you have at least two sets of backup media:

2 USB memory drives

2 CD's

2 week supply of floppy disks (floppies are erased with every backup therefore 1 set per day for a two week period).

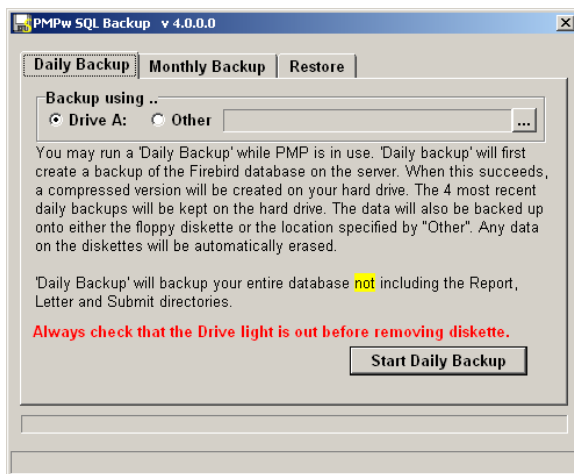
While you are using 'backup set # 1', 'backup set # 2' should be stored off site.



Note: We recommend you perform the PMP Daily Backup even if other programs are being utilized. If there is a problem with your program the PMP Support Staff can usually get you up and running in minimal time if you are utilizing the PMP Backup. **The OCA is not responsible for any other backup program.**

Accessing and Using Backup

Exit PMP on all computers. Double click the **Backup SQL** icon on the desktop.



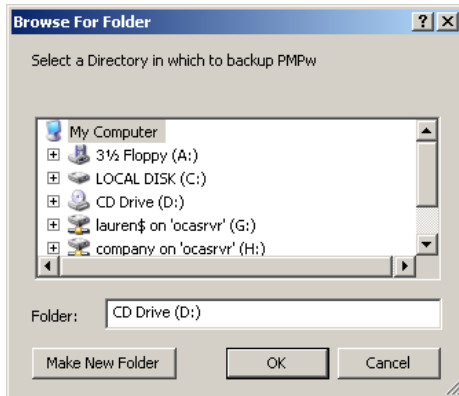
Click either Daily Backup or Monthly Backup. Daily Backup contains your patient data and generated report data.

Monthly Backup contains your patient data, generated report data, and the Report and Letter directories.

PMP allows backups to be created to any specified media. Click the radio button beside **Drive A:** to send the backup to floppy diskette. Click the radio button beside **Other** to select another media.



Click the button with the 3 dots to choose the drive.



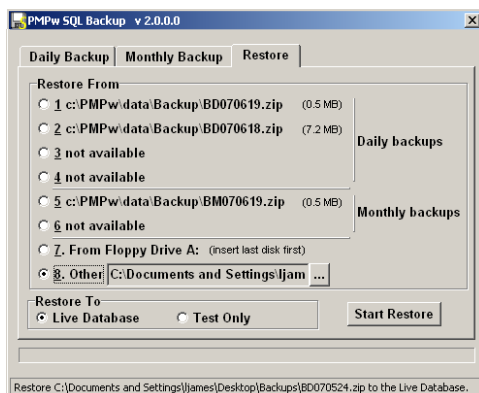
Locate the drive for the media of choice. Click **OK**. Click **Start Daily** or **Monthly Backup**. PMP creates two backups; the first backup goes to the hard drive of your computer and the second goes to the specified drive.

Monthly backups should be created:

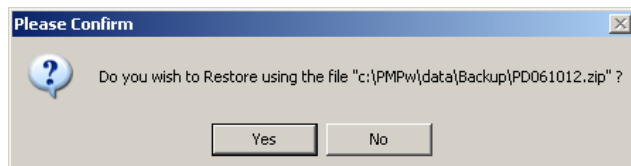
- on a monthly basis
- when making a last backup before moving PMP to a new / different computer
- before deleting patient data or reports.
- before installing updates or adding practitioners to PMP.

Test Restore

After 6 backups have been performed you will see the message *'You have performed 6 backups without doing a test restore'*. If you choose not to perform the test restore at this time the message will appear upon completion of each subsequent backup until the test restore is performed.



To perform the test restore leave the media that you just used for the backup in the drive, click the Restore tab, # 7 or # 8. Click **Test Only** and click **Start Restore**.



You are asked if you wish to restore using the file BD091118.zip or BM091118.zip.

The file name is created as follows: BD stands for Backup Daily, BM stands for Backup Monthly. 091118 stands for year 2009, month 11, day 18. Make sure this is the correct date when doing a test restore.

The test restore does a file comparison to make sure the data is good and that it will restore if required. When the test restore is complete a pop-up window will appear entitled *Finished*.

Click **Yes** to erase the test data.

Restore

There are times when you have to restore a backup. This could be due to a power failure, power surge, the computer may have been turned off incorrectly or the computer froze.

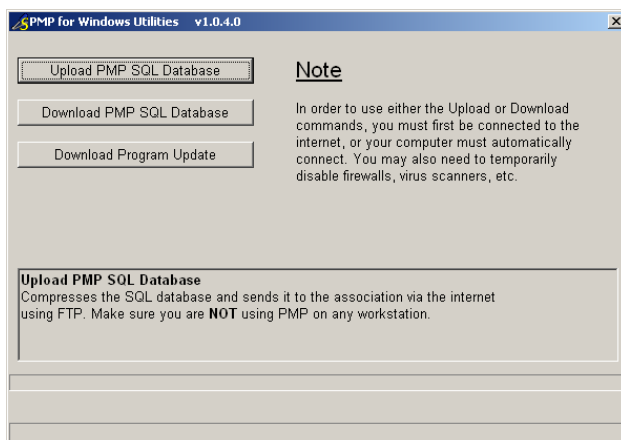
Double click the **PMP Daily Backup** icon on the desktop. Click the **Restore** tab, click on the backup that you wish to restore from the list on the left.

Choosing to restore a backup from the **# 8 Other** option will require you to locate the backup. Choose the directory where your backup was stored by double clicking on it. Locate and double click the backup that you want to restore.

Click **Live Database, Start Restore**. You will be asked to confirm the date of the backup. Click **OK**.

Utilities

PMP has a desktop icon named PMPs Utilities. The area is for use if you have internet capabilities at your PMP location.



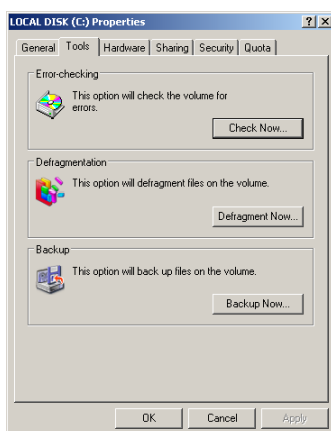
- **Upload PMP SQL Database** is an option whereby you can send your program to an FTP site where our programmer can access it for repair. This feature can only be used when PMP support staff has arranged it. Please contact support before attempting to use this feature as you will not have access to your data once it has been sent. **Note:** Restoring your last backup would allow you back into PMP.
- **Download PMP SQL Database** is how you retrieve your data once it has been repaired.
- **Download Program Update.** On occasion updates are available for download. You will be notified when they are posted by whichever method you have chosen for OCA communication.

Computer Maintenance

Error Checking

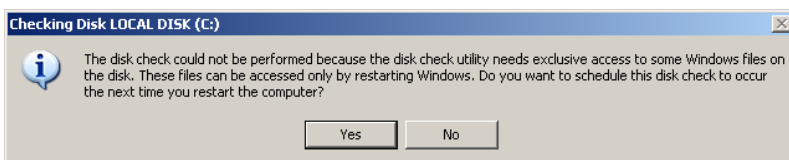
Error Checking is a program in your Windows Operating System that will check the files on the hard drive to make sure there are no problems. If problems are found it will attempt to fix them.

To prevent problems from occurring in your computer, you should run Error Checking on a weekly basis or when you have had to shut down the computer in an improper manner.



To access Error Checking double click the **My Computer** icon, right click **C:**, and left click **Properties**. Select the **Tools** tab. Click **Check Now....**

Checkmark both options on the next screen and click **Start**. You will see a screen offering to schedule the check on the next restart. Click **Yes**. Error checking may take up to one hour.



Restart your computer.

Defragment

Defragmentation is a program provided by your Windows Operating System that analyzes local volumes and consolidates fragmented files and folders so that each occupies a single, contiguous space on the volume. As a result, your system can access files and folders and save new ones more efficiently. By consolidating your files and folders, Disk Defragmenter also consolidates a volume's free space, making it less likely that new files will be fragmented.

To access Defrag double click the **My Computer** icon, right click **C:**, and left click **Properties**. Select the **Tools** tab. Click **Defragment Now....** Click **Defragment**. Defragment may take up to two hours.

✓ **Hint:** If it appears that Defragment restarts part way through the process and does not complete or gives a message about restarting, turn off your screen saver, temporarily disable your virus protection, and/or close your messaging program.

Cleaning Up Your PMP

Deleting Patients

On occasion you may wish to delete patients from your PMP. PMP will not allow you to delete a patient if there is any activity within the last year.

- Do a backup and label with the date prior to deleting any patients.
- Pull a list of patients that have not been to your clinic for a number of years through query.
- Determine which patients you would like to delete from the program.
- Print a Patient History and Profile for each patient.
- Delete patients individually as per the instructions below.

Click **Patient, Delete a Patient**. Select the patient. The patient information screen will appear to allow you to confirm that you would like to delete this patient. Once you are sure click **Continue**. A confirmation screen will appear. Click **Yes**.

Accounts Receivable

Keep your accounts receivable up to date. There is no sense in having the same balances on your A/R from year to year.

- Print Accounts Receivable
- Determine patients:
 - to be called
 - to be mailed a letter
 - to be sent to a collection agency
 - to be written off

To Access the Patient Accounts Receivable, click the **Report** menu, **Accounts Receivable, Patient**. Select the appropriate doctor, **Prepare Accounts Receivable for this Doctor**. Choose the correct ending date by clicking the down arrow. Click **Run the Report**.

Tue, 19 Sep 2006		Patient Accounts Receivable - Dr. D.D. Palmer, DC				Page No. 8		
Period Ending : 19-Sep-2006								
Patient	Name	Home Phone	Business Phone	Ext.	Last Payment	Last Statement	Last Visit	Next Visit
773	Vansteijn, Gary Neil	(416) 449-6293			Aged : 0.00	0.00	14-Sep-2005	19-Sep-2005
1595	Varcoe, Elisabeth	(416) 512-6181			26-Apr-2000	28-Apr-2000	0.00	30.00
					Aged : 0.00	0.00	0.00	175.00
1539	Wade, Ian	(905) 882-4962	(416) 375-1236		18-Sep-2006	18-Sep-2006	0.00	0.00
					Aged : 17.00	0.00	0.00	17.00
159	Wellwood, Betty Anne	(416) 638-9553				08-Mar-2000	24-Feb-2004	
					Aged : 0.00	0.00	0.00	80.00
								80.00
168	West, Blake Joseph	(416) 485-7524	(416) 865-0191	323	09-Apr-2000	14-Apr-2000	0.00	51.11
					Aged : 0.00	0.00	0.00	51.11
1530	Winkworth, Paulette	(416) 636-9443				22-Jan-2000	24-Feb-2004	09-Sep-2006
					Aged : 0.00	0.00	0.00	145.10
					19-Oct-2005	02-May-2000	19-Apr-2006	09-Sep-2006
34	Wright, Alida	(742) 4274			Aged : 0.00	0.00	0.00	30.00
								30.00
194	Ysinga, Brent	(241) 7152				06-Nov-1999	14-Apr-2000	
					Aged : 0.00	0.00	0.00	54.00
								54.00
					-1455.09	210.00	0.00	5060.31
								3815.22

Aged : 0-30 days

31-60 days

61-90 days

over 90

Bal. Due

Print 3rd Party and WCB Accounts Receivables.

Documents for Printing

An area of PMP that needs to be cleaned out regularly is **Documents for Printing**. This is a region where files of different types are stored in PMP. The number of documents contained in Documents for Printing is directly related to the amount of space required for your monthly backups. After about 3 months documents can be deleted as they are saved on monthly backups. Keep the number of reports to a minimum for optimum usage of your computer and PMP.

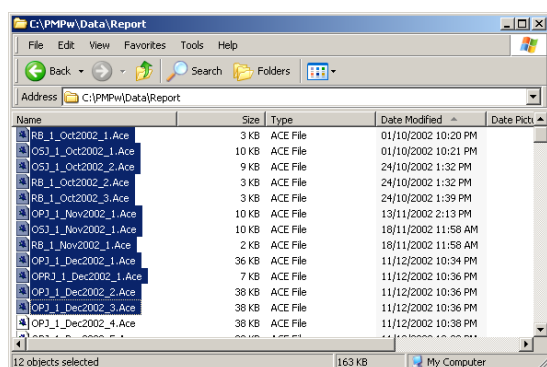
To access this area click **Reports, Documents for Printing**. Reports and documents that may be stored in Documents for Printing include: MH Claim Journals, Payment Journals, Rejection Journals, WCB and MPI Claim Journals, Payment Journals, Documents saved for Exporting.

To delete documents for printing right click the appropriate file and choose delete from the list.

To delete multiple documents close PMP. Double click on the **My Computer** icon. Double click your **C:** drive. Locate and double click **PMP, Data, Report**. Click the **View** menu, **Details**. Click the column header **Date Modified**. This will sort the reports by creation date. Make sure the arrow beside date modified is pointing up so that the oldest reports will be at the top of the screen.

You can now click on the first report to be deleted. Press and hold down the **Shift** key and click onto the last report to be deleted. All reports in between will be highlighted. Once the chosen reports have been highlighted press the **Delete** key on your keyboard.

Click **Yes** when prompted to confirm sending the items to the recycle bin.



PMP Word Pad

The number of letters contained in the word pad also affects the amount of space required for your monthly backups. After a while letters can be deleted as they are saved on monthly backups. Keep the number of letters to a minimum for optimum usage of your computer and PMP.

To delete letters or letterheads from the PMP click File, WordProcessor, File, Open. Determine the files to be deleted.

Right click on the appropriate letter to be deleted and choose Delete from the menu.

To delete multiple documents close PMP. Double click on the **My Computer** icon. Double click your **C:** drive. Locate and double click **PMP, Data, Letters**. You can now click on the first letter to be deleted. Press and hold down the **Shift** key and click onto the last letter to be deleted. All letters in between will be highlighted. Once the list is highlighted, press the **Delete** key on your keyboard. Click **Yes** when prompted to confirm sending the items to the recycle bin.

APPENDIX

Manitoba Health Diagnostic Codes

A06	Traumatic Disc Syndrome, Cervical	B08	Traumatic Disc Syndrome, Lumbar
A07	Traumatic Disc Syndrome, Thoracic	B10	Subluxation, Cervical
A08	Traumatic Disc Syndrome, Lumbar	B11	Subluxation, Thoracic
A10	Subluxation, Cervical	B12	Subluxation, Lumbar
A11	Subluxation, Thoracic	B13	Subluxation, Lumbosacral And/or Sacroiliac
A12	Subluxation, Lumbar	B14	Subluxation, Multiple Spinal Areas
A13	Subluxation, Lumbosacral And/or Sacroiliac	B20	Sprain, Cervical
A14	Subluxation, Multiple Spinal Areas	B21	Sprain, Thoracic
A20	Sprain, Cervical	B22	Sprain, Lumbar
A21	Sprain, Thoracic	B23	Sprain, Lumbosacral And/or Sacroiliac
A22	Sprain, Lumbar	B24	Sprain, Multiple Spinal Areas
A23	Sprain, Lumbosacral And/or Sacroiliac	B30	Strain, Cervical
A24	Sprain, Multiple Spinal Areas	B31	Strain, Thoracic
A30	Strain, Cervical	B32	Strain, Lumbar
A31	Strain, Thoracic	B33	Strain, Lumbosacral And/or Sacroiliac
A32	Strain, Lumbar	B34	Strain, Multiple Spinal Areas
A33	Strain, Lumbosacral and/or Sacroiliac	B40	Fibrositis; Fibrosis; Muscular Hypertonicity, Cervical
A34	Strain, Multiple Spinal Areas	B41	Fibrositis; Fibrosis; Muscular Hypertonicity, Thoracic
A40	Fibrositis; Fibrosis; Muscular Hypertonicity, Cervical	B42	Fibrositis; Fibrosis; Muscular Hypertonicity, Lumbar
A41	Fibrositis; Fibrosis; Muscular Hypertonicity, Thoracic	B43	Fibrositis; Fibrosis; Muscular Hypertonicity, Lumbosacral
A42	Fibrositis; Fibrosis; Muscular Hypertonicity, Lumbar	B44	Fibrositis; Fibrosis; Muscular Hypertonicity, Multiple Areas
A43	Fibrositis; Fibrosis; Muscular Hypertonicity, Lumbosacral	B50	Neuralgia And/or Neuritis, Cervical
A44	Fibrositis; Fibrosis; Muscular Hypertonicity, Multiple Areas	B51	Neuralgia And/or Neuritis, Brachial
A50	Neuralgia And/or Neuritis, Cervical	B52	Neuralgia And/or Neuritis, Intercostal
A51	Neuralgia And/or Neuritis, Brachial	B53	Neuralgia And/or Neuritis, Lumbar
A52	Neuralgia And/or Neuritis, Intercostal	B54	Neuralgia And/or Neuritis, Sciatic
A53	Neuralgia And/or Neuritis, Lumbar	B55	Neuralgia And/or Neuritis, Multiple Areas
A54	Neuralgia And/or Neuritis, Sciatic	B60	Spinal Whiplash Areas, Cervical
A55	Neuralgia And/or Neuritis, Multiple Areas	B61	Spinal Whiplash Areas, Thoracic
A60	Spinal Whiplash Areas, Cervical	B62	Spinal Whiplash Areas, Lumbar
A61	Spinal Whiplash Areas, Thoracic	B63	Spinal Whiplash Areas, Multiple Spinal Areas
A62	Spinal Whiplash Areas, Lumbar	B70	Spinal Whiplash Areas, Abnormal Spinal Curvature
A63	Spinal Whiplash Areas, Multiple Spinal Areas	B71	Spinal Whiplash Areas, Cervical Headache Syndrome
A71	Spinal Whiplash Areas, Cervical Headache Syndrome	B72	Spinal Whiplash Areas, Coccydynia
A72	Spinal Whiplash Areas, Coccydynia	B73	Spinal Whiplash Areas, Neurovascular Compression Syndrome
A73	Spinal Whiplash Areas, Costochondral Pain Syndrome	B74	Spinal Whiplash Areas, Costochondral Pain Syndrome
A74	Spinal Whiplash Areas, Neurovascular Compression Syndrome	B75	Spinal Whiplash Areas, Postural Stress Syndrome
A80	Non_spinal Articulations & Para_articular Tissues, Subluxation	B76	Spinal Whiplash Areas, Congenital Spinal Anomalies
A81	Non_spinal Articulations & Para_articular Tissues, Sprain	B80	Non_spinal Articulations & Para_articular Tissues, Subluxation
A82	Non_spinal Articulations & Para_articular Tissues, Strain	B81	Non_spinal Articulations & Para_articular Tissues, Sprain
A83	Non_spinal Articulations & Para_articular Tissues, Tendonitis	B82	Non_spinal Articulations & Para_articular Tissues, Strain
A84	Non_spinal Articulations & Para_articular Tissues, Bursitis	B83	Non_spinal Articulations & Para_articular Tissues, Tendonitis
A85	Non_spinal Articulations & Para_articular Tissues, Synovitis	B84	Non_spinal Articulations & Para_articular Tissues, Bursitis
A86	Non_spinal Articulations & Para_articular Tissues, Icd	B85	Non_spinal Articulations & Para_articular Tissues, Synovitis
A87	Non_spinal Articulations & Para_articular Tissues, Mft, mh	B86	Non_spinal Articulations & Para_articular Tissues, Icd
A88	Non_spinal Articulations & Para_articular Tissues, Neuralgia	B87	Non_spinal Articulations & Para_articular Tissues, Mft, mh
B01	Degenerative Disc & Joint Disease, Cervical	B88	Non_spinal Articulations & Para_articular Tissues, Neuralgia
B02	Degenerative Disc & Joint Disease, Thoracic	B89	Non_spinal Articulations & Para_articular Tissues, Degenerative Disk Disease
B03	Degenerative Disc & Joint Disease, Lumbar	C99	Other Conditions (must be specified)
B04	Degenerative Disc & Joint Disease, Lumbosacral and/or Sacroiliac		
B5	Degenerative Disc & Joint Disease, Multiple Spinal Areas		
B06	Traumatic Disc Syndrome, Cervical		
B07	Traumatic Disc Syndrome, Thoracic		

Manitoba Health Disposal Codes

Manitoba Health Disposal Codes

00	Note the change in registration number	30	Letter of explanation written re: this assessment
01	Claim rejected-MHR No. not valid as reported	31	Service rejected-Surgical benefit less than reg'd
02	Note the change/correction in surname	32	Claim rejected-Claim is W.C.B. liability
03	Duplicate account - claim previously processed	33	Fee assessed-maximum auto-haematology benefit reached
04	Claim rejected-MHR No cancelled prior to service	34	Fee assessed-maximum auto-biochem benefit reached
05	Claim rejected-service prior to date of coverage.	35	Note the change in birth date-check your records
06	Claim rejected-Unable to identify as a resident.	36	Note the change in given name-check your records
07	Note change in sex code.	37	Note correct surname for this patient only
08	Service rejected-Service excluded from MHSC.	38	Service rejected-prior approval of MHSC is needed
09	Service rejected-Not an approved facility	40	Claim returned - additional information required
10	Service rejected-Facility not approved for service	41	Claim can not be located - please submit new claim
11	Service incl. in block fee-service assessed accord.	42	Claim held pending establishment of fee.
12	Service processed-Medical officer assessment	43	Claim held pending receipt or processing form #577
13	Service Processed as per Dental Review Committee	44	Data submitted incomplete or incorrect
14	Claim processed-Referring doctor not registered	50	Fee has been adjusted to benefit level
15	Patient identified-resident of other prov/country	51	Fee has been reduced to benefit level
16	Claim rejected-P.I.N. or province code is invalid	53	Fee assessed-Tariff number has been changed
17	Service rejected-another doctor charged same serv.	54	Repeat procedure-assessed as per #'s 29, 38, 40 & 43
18	Claim rejected-Patient name, dob & sex not regist.	55	Multiple procedure as per # 25, 26, 27, 36 & 37
19	Patient not eligible for MHSC benefits-AFP, RCMP	56	Bilateral procedure as per #28
20	Service processed-as per practitioner/consultant	57	Multiple procedure-as per O.S.A. guideline #3
21	Service assessed-Service incl. operation/anaesth	58	Bilateral procedure-as per O.S.A. guideline #1, 2, 4
22	Claim rejected-MHSC query not answered.	70	Claim received and in process
23	Claim rejected-Claim received after 6 months.	71	Claim under investigation - edit
24	Fee assessed-Maximum benefit for routine eye exam.	72	Claim under investigation - eligibility.
25	Fee assessed-Maximum benefit reached(Medical)	73	Claim under investigation - assessment.
26	Claim rejected-post operative care not needed.	74	Electronic media claim - received and in process.
27	Fee assessed-Maximum benefit reached(Optometric)	CR	Credit adjustment-service processed incorrectly
28	Service rejected-Service included in exam fee.	DR	Withdrawal-service previously paid in error
29	Fee assessed-Maximum benefit reached (Chiropractic)		

Workers Compensation Board Fees

Schedule "A"

Item	Effective October 2007
Initial History & Examination	\$43.64
Treatment Fee Adjustment/Adjunctive Therapy	\$29.64
Emergency/House Call	\$26.27
Regular Reporting	\$33.76
Narrative Report or Referral	\$112.55
WCB Consultant Phone Calls*	\$202.59/hour **

* Initiated by a WCB Chiropractic Consultant to an external chiropractor

** Per hour, calculated on the basis of twelve (12) five minute increments.

Workers Compensation Chiropractic X-ray Fees

Effective September 1, 2003

Tariff	View	Tech	Prof	Total
7024	Chest Single PA *	18.00	8.00	26.00
7025	Chest PA & Lateral *	21.70	9.00	31.70
7031	Ribs One Side	24.40	6.00	30.40
7331	Ribs Both Sides	24.75	9.80	34.55
7036	CS Routine Views *	30.20	12.00	42.20
7038	CS Added Views	35.70	10.80	46.50
7194	Thoracic Spine	30.35	7.00	42.05
7193	L.S. Routine *	29.50	11.70	42.05
7054	L.S. Added Views	35.70	10.80	46.50
7035	Spine Complete	64.35	17.40	81.75
7037	Spine Two Views	47.00	19.00	66.00
7039	Pelvis AP Views *	20.30	9.00	29.30
7339	Pelvis Lat/Hip	29.00	12.60	41.60
7041	S.I. Joints	19.60	6.00	25.60
7034	Sacrum/Coccyx	27.95	7.45	35.40
7402	Special views	28.55	7.00	35.55
7046	Claviale/Scapula	17.40	6.00	23.40
7047	Humerus	21.10	4.80	25.90
7048	Elbow	23.00	8.00	31.00
7049	Forearm	22.10	4.80	26.90
7050	Wrist *	17.70	8.00	25.70
7052	Fingers *	14.00	8.00	22.00
7093	AC Joints	20.85	7.50	28.25
7044	Shoulder *	22.10	9.90	32.00
7403	Added Views	7.50	4.00	11.50
7053	Hip *	26.10	9.80	35.90
7055	Femur	23.00	4.80	27.80
7056	Knee *	18.30	8.30	26.60
7058	Tibula/Fibula	23.00	4.80	27.80
7059	Ankle *	17.80	8.00	25.80
7060	Foot	16.50	8.00	24.50
7062	Toes	8.70	2.95	11.65
7404	Added Views	8	4.00	12.00

Manitoba Public Insurance Fee Schedule

Chiropractic Services Schedule “A”

1. Initial Assessment (Complete History, Physical Examination, Diagnosis, Treatment and Adjunctive Therapy)

EFFECTIVE DATE	FEE
January 1, 2010	\$78.23

2. Subsequent Visit Fees: (One Fee per Visit)
 - a) Subsequent Treatment

EFFECTIVE DATE	FEE
January 1, 2010	\$33.26

 - b) Supervisory Visit

EFFECTIVE DATE	FEE
January 1, 2010	\$33.26

 - c) Acupuncture Treatment

EFFECTIVE DATE	FEE
January 1, 2010	\$50.12

Up to 10 acupuncture treatment visits will be covered per claim. No extensions shall be permitted.

 - d) Active Release Treatment (A.R.T.)

EFFECTIVE DATE	FEE
January 1, 2010	\$50.12

Up to 10 active release treatments will be covered per claim. No extensions shall be permitted.

3. Emergency Calls: Travel Only
 - a) Emergency Calls: Travel Only (50 kilometers or less)

EFFECTIVE DATE	FEE
January 1, 2010	\$41.87

 - b) Travel Beyond 50 Kilometers – Per Each Additional 16 Kilometers

EFFECTIVE DATE	FEE
January 1, 2010	\$9.48

4. Consultation Fee for Review of Manitoba Public Insurance Cases:

Includes Meeting in Person or Consultation by Phone

EFFECTIVE DATE	FEE
January 1, 2010	\$198.47/per hour

5. Narrative Report

Where a narrative report is requested by Manitoba Public Insurance, it will be billed per page, to a maximum of 5 billable pages per report. Half pages will be charged at a rate of one half of the full page fee. All chiropractors shall use 1" margins, single spaced and 12 Font in order to be eligible for payment.

EFFECTIVE DATE	FEE
January 1, 2010	\$99.68 per page

6. Form Reports

Initial Chiropractic Report
Chiropractic Track I Report
Chiropractic Track II Report
All 3 reports will attract the following fees:

EFFECTIVE DATE	FEE
January 1, 2010	\$47.27

7. Referral letter or report of findings letter to another Health Care discipline outside your clinic. The discipline must be one recognized by Manitoba Public Insurance.

EFFECTIVE DATE	FEE
January 1, 2010	\$99.68

8. Supports that are medically required are to be billed at manufactured suggested list with the exception of the cervical pillow where the maximum fee is:

EFFECTIVE DATE	FEE
January 1, 2010	\$62.00 plus PST

9. The "Yellow Flags" Questionnaire shall be compensated at the rate of \$5.57 each.

X-Ray Fee Schedule

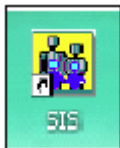
		TECH.	PROF.
1.	APL C-Spine (3 views)	\$47.01	\$17.10
2.	APLC Flexion and Extension (5 views)	\$60.15	\$17.10
3.	Pillar Views (2 - 8/10)	\$31.98	\$17.10
4.	Davis Series	\$94.02	\$17.10
5.	APL C-Spine (AP - 7/17)	\$39.51	\$17.10
6.	APL Dorsal	\$47.01	\$17.10
7.	APL Lumbar	\$47.01	\$17.10
8.	APL Lumbosacral	\$47.01	\$17.10
9.	APLLS and Both Obliques	\$69.60	\$17.10
10.	Shoulder Series	\$31.98	\$17.10
11.	Full Spine APL (14/36)	\$80.86	\$28.21
11.	(a) Full Series - APLC - APLT - APLLS	\$94.02	\$28.21
12.	APL C-Spine and Obliques (5 views)	\$60.15	\$17.10
13.	Extremities (2 views)	\$31.98	\$17.10
14.	Pelvis (1 - 14/17)	\$22.58	\$17.10
15.	Knee	\$31.98	\$17.10
16.	Ankle (3 views)	\$31.98	\$17.10
17.	Sinuses	\$63.93	\$17.10
18.	Ribs (2 - 14/17)	\$46.48	\$17.10
19.	Chest	\$46.48	\$17.10
20.	Written Reports for Films sent in (1 area)	N/A	\$17.10
21.	Written Reports for Films 14/36 (2 views)	N/A	\$27.27
22.	Additional Films (8/10) of any area	\$13.16	
23.	Motion Study includes an A.P. and Lat Plain View - per area	N/A	\$236.95

Manitoba Health Electronic Billing Instructions

You must register with Manitoba Health for the EPICs program.

Once your office has been set up as an electronic billing site (this may take three – four weeks) follow the billing instructions found on page 57 of this handbook. Once the billing file is created you may send the file to Manitoba Health electronically.

Make sure PMP is closed. Double click the **SIS** icon.



Type in the following information **Username, Password, Domain and PASSCODE**. The **username** and **passcode** will be included in the documentation you received with your initial package from Manitoba Health. The first password will be assigned by MH, which you will be able to change. The **PASSCODE** is a combination of a **P.I.N.** and the number on the **RSA SecurID** (which will change every 60 seconds). You will work with the SIS support team who will assign the password and P.I.N. Refer to the **Secure Internet Solutions (SIS) Application Portal Installation Guide and User Manual** for details.

For details on setting a PIN and Password please refer to the **Secure Internet Solutions (SIS) Application Portal Installation Guide and User Manual**.

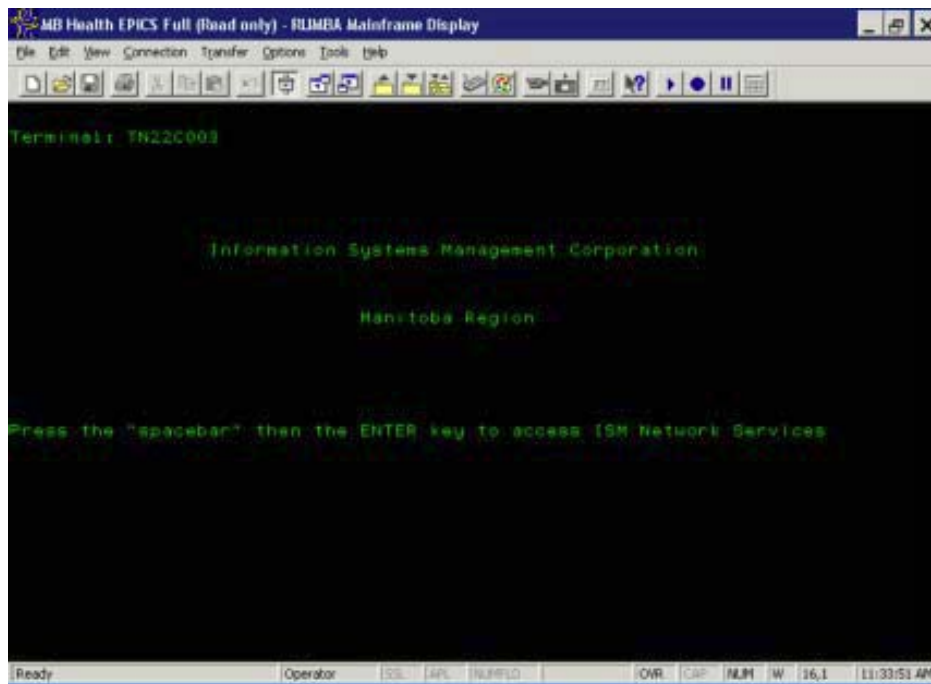


Note: If you experience trouble contact the SIS Help Desk at (204)944-2802 or (800) 637-0551

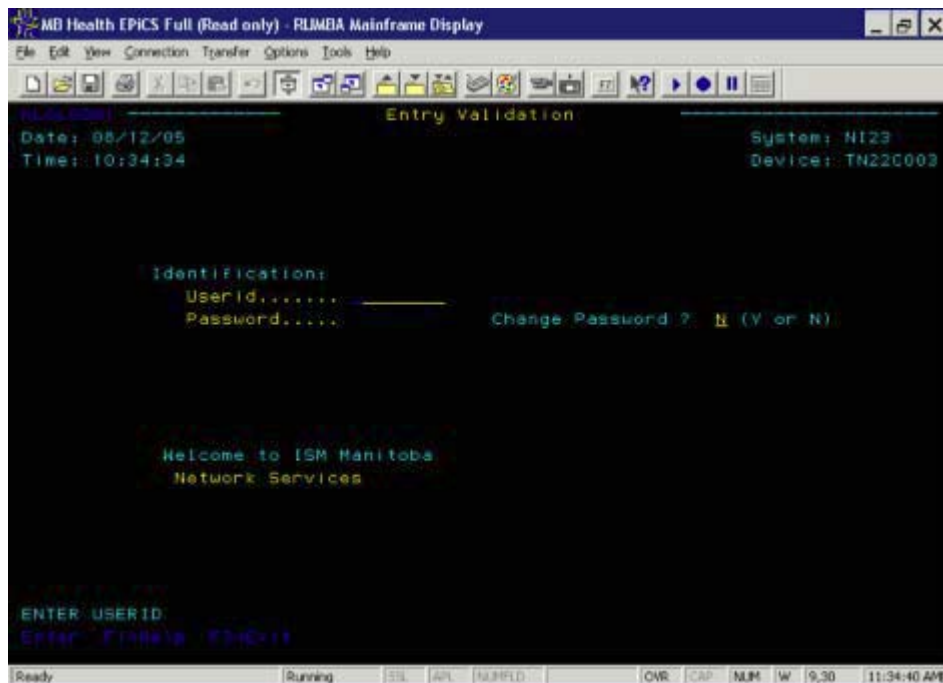
A screenshot of the SIS Application Portal login interface. On the left is a 'Login' window with four input fields: Username, Password, Domain, and PASSCODE, each preceded by a red dot. A 'Log In' button is at the bottom right of the window. On the right is the main portal page with a teal header 'Authorized Access Only'. Below it, the text 'Please log in' is followed by instructions to enter credentials and click 'Log In'. A link for forgotten login information points to a help desk. Below this is the 'SIS Message Center' section, which states that the message center displays any informational or critical messages. The SIS logo is in the bottom right corner.

Once you have entered the information click **Log In**.

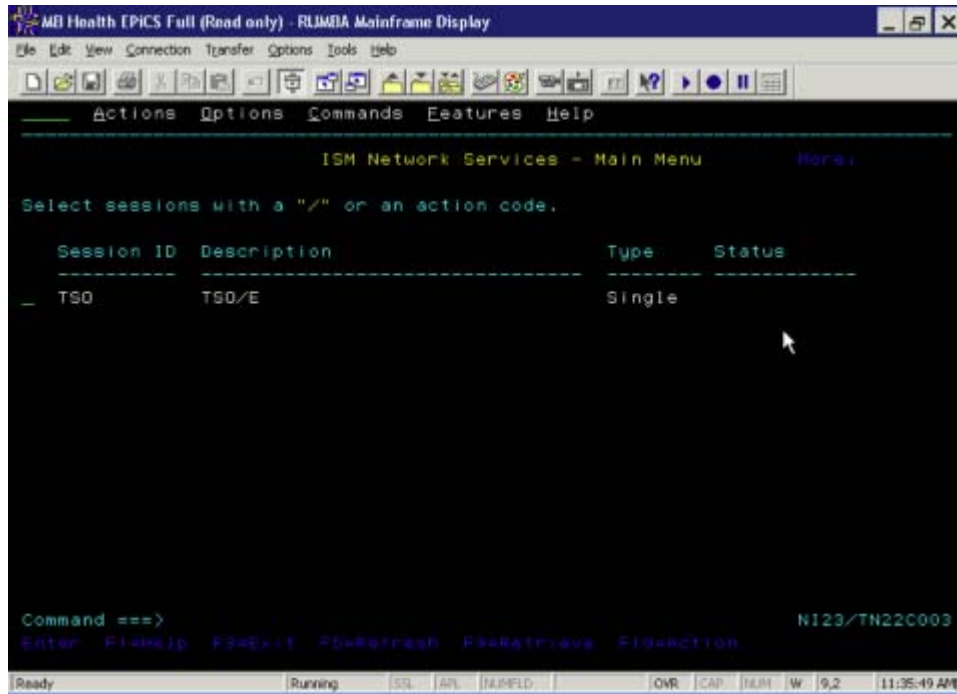
Click once on the Application Icon once and in 30 – 60 seconds the application will appear.



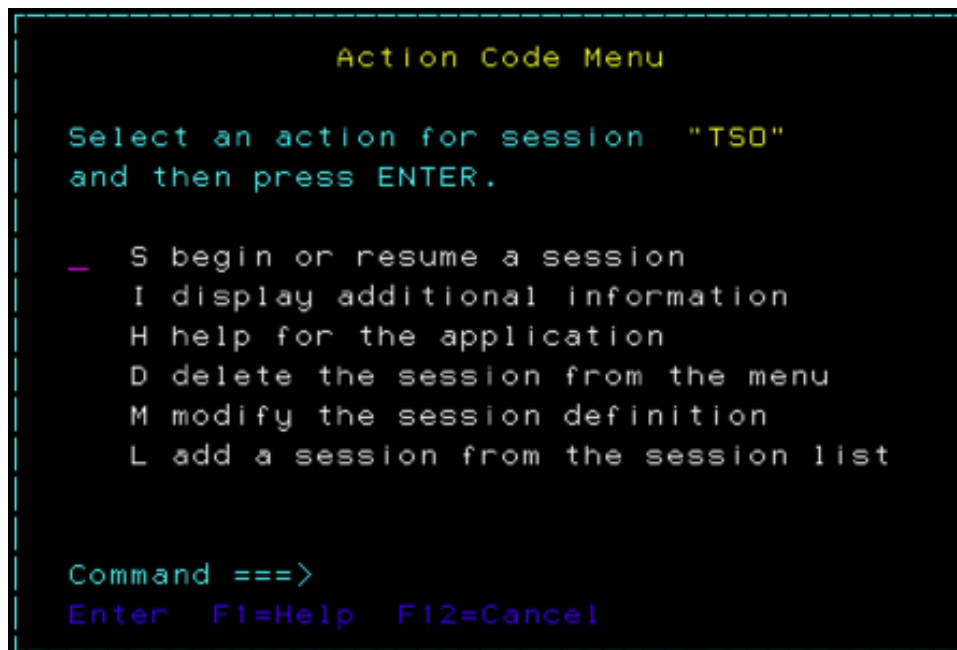
Press the **Spacebar**, then **Enter**.



Type your **UserID**, press **Tab**. Type your **Password**, press **Enter**.



Press **F10**.



A pop up window will appear entitled **Action Code Menu**. Press **Enter** to begin the session.

```

MB Health EPICS Full (Read only) - RJMBA Mainframe Display
File Edit View Connection Transfer Options Tools Help

----- Manitoba Health Services Commission - Row 1 to 13 of 25
Messages For A44T999

Data - 05-09-22
Time - 16:49

Last Submission Auditted
Last Remittance Available

Messages:

www: INFORMATION UPDATED: SEP 16, 2005

CLAIM SUBMISSION AND REMITTANCE DUE/DATES
MAY MID-MOUTH REMITTANCE: MUST BE DOWNLOADED BEFORE 5:00 P.M. SEP 24, 2005
MAY NORTH-END PAYMENT: CLAIMS RECEIVED BEFORE 5:00 P.M. SEP 24, 2005

*****
***** OFFICE WILL BE CLOSED September 5, 2005. Submissions received after
***** on Friday September 2 will be processed by 9:00am Tuesday September 6.
***** certain tariffs for REGISTERED NURSE EXTENDED PRACTICE ARE NOW AVAILABLE
***** PLEASE CONTACT YOUR VENDOR BEFORE DOWNLOADING.
*****
***** OFF DATES FOR 2005:
***** PLEASE PRESS THE F8 KEY FOR MORE INFORMATION *****

Ready Running SQL APL RUMPD OVR CAP NUM W 4,3 11:44 AM
  
```

The Manitoba Health Message screen will contain information about your last submission, about the last remittance file available, as well as information about submission cut off dates. These messages should be reviewed at sign-on as important information will communicated in this way. Press **F8**.

```

MB Health EPICS Full (Read only) - RJMBA Mainframe Display
File Edit View Connection Transfer Options Tools Help

----- Manitoba Health -----
Data Transfer Utility

Data - 05-09-22
Time - 16:22

COMMAND/OPTION ==>

U - Download Claims from P.C. to Mainframe Health
D - Download Remittance Information from MB Health to P.C.

P1 - Print Claim Submission Confirmation Report
P2 - Print Remittance Summary Report

M - Show Messages

TR - Download NEW Tariff Rate File (UPDATED Sept 14, 2005)
TD - Download NEW Tariff Description File (UPDATED Sept 14, 2005)
*** PLEASE DO NOT DOWNLOAD THE TARIFF FILES WITHOUT VENDOR APPROVAL ***
*** Download Tar Rate Increases are now available ***

PC File Name (Upload/Download Only)
  Price Code: C
  Path Code: PPMW\DATA\SUBMIT
  Name Code: SUBMIT
  Ext Code: 101

Press Command/Options: U D P1 P2 M TR TD HELP(F1) END(F3)

Ready Running SQL APL RUMPD OVR CAP NUM W 4,22 3:41:24 PM
  
```

The following is a description of each area on the **Data Transfer Utility** screen:

- U** Upload Claims
- D** Download Remittance
- P1** Print claim submission Audit Control Confirmation Report (Must be done after each submission to confirm receipt status. Without this confirmation claims as submitted will not be processed.)
- P2** Print Remittance Summary Report
- M** Review Messages
- TR** Download Tariff Rates
- TD** Download Tariff Description
- HELP** Online **Quick Reference** Help information
- END** Terminate the Session

A selection is made by typing the option to the right of **COMMAND/OPTION** line and pressing **Enter**.

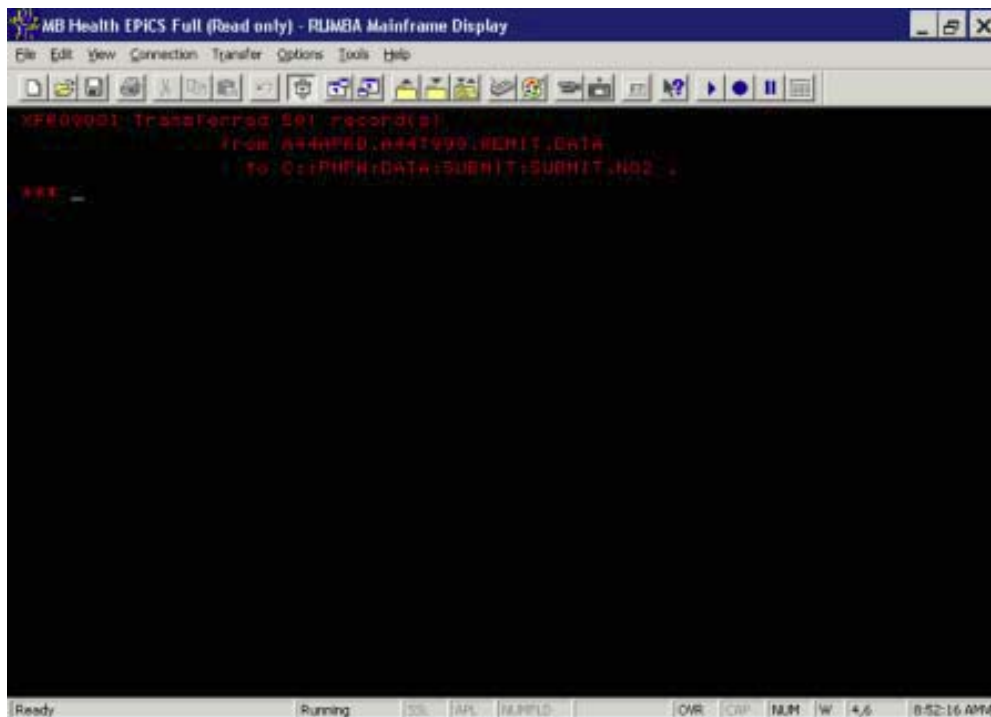
To upload the submission type **U**, press the **Tab** key. The cursor will move to the right of the **Drive** line near the bottom of the screen. Type **C** for the drive location, press the **Tab** key.

Type **PMP\DATA\SUBMIT**. Press the **Tab** key. Type **SUBMIT**, press the **Tab** key. Type the file name that you were given during the creation of the MH submission in PMP, i.e. **No1**. Press **Enter**. Press the **Tab** key.



Note: You will only have to type the file extension (**N01, 2, 3, etc**) the first time you send a submission. All other information will be remembered.

Press the **F3** key. Once you have pressed **Enter** to release the upload, the screen will change.



The screen will state that the file transfer was successful. If there is an error, re-enter the information and try again. Press **F3** to return to the **Data Transfer Utility** screen.

Press **P1** to print claim submission Audit Control Confirmation Report.

A44ML328PT	M.H.S.C.		
FILE EXCHANGE AUDIT CONTROL REPORT			
PREPARED 95 01 03			
USER NO 00999 TEST ELECTRONIC USER	12:20:24	03-01-95 PAGE 0001	1ST CLM# 000465777
PHYSICIAN 01111 DOCTOR ONE			
PHYSICIAN 01111 # OF SOCIOL RECORDS	1		
# OF ADDRESS RECORDS	1		
# OF REMARKS RECORDS	2		
# OF SERVICE RECORDS	1		
# OF NON-RES RECORDS	1		
TOTAL FEE SUBMITTED	\$373.60		
USER NO 00999 TEST ELECTRONIC USER	12:20:24	03-01-95 PAGE 0002	1ST CLM# 000465777
PHYSICIAN 02222 DOCTOR TWO			
PHYSICIAN 02222 # OF SOCIOL RECORDS	1		
# OF ADDRESS RECORDS	1		
# OF REMARKS RECORDS	2		
# OF SERVICE RECORDS	1		
# OF NON-RES RECORDS	1		
TOTAL FEE SUBMITTED	\$189.70		
USER NO 00999 TEST ELECTRONIC USER	12:20:24	03-01-95 PAGE 0003	1ST CLM# 000465777
PHYSICIAN 03333 DOCTOR THREE			
PHYSICIAN 03333 # OF SOCIOL RECORDS	1		
# OF ADDRESS RECORDS	1		
# OF REMARKS RECORDS	2		
# OF SERVICE RECORDS	1		
# OF NON-RES RECORDS	1		
TOTAL FEE SUBMITTED	\$121.20		
USER NO 00999 TEST ELECTRONIC USER	12:20:24	03-01-95 PAGE 0004	1ST CLM# 000465777
PHYSICIAN 04444 DOCTOR FOUR			
PHYSICIAN 04444 # OF SOCIOL RECORDS	1		
# OF ADDRESS RECORDS	1		
# OF REMARKS RECORDS	2		
# OF SERVICE RECORDS	1		
# OF NON-RES RECORDS	1		
TOTAL FEE SUBMITTED	\$176.00		
USER NO 00999 TEST ELECTRONIC USER	12:20:24	03-01-95 PAGE 0005	1ST CLM# 000465777
PHYSICIAN 05555 DOCTOR FIVE			
PHYSICIAN 05555 # OF SOCIOL RECORDS	1		
# OF ADDRESS RECORDS	1		
# OF REMARKS RECORDS	2		
# OF SERVICE RECORDS	1		
# OF NON-RES RECORDS	1		
TOTAL FEE SUBMITTED	\$426.45		
USER NO 00999 TEST ELECTRONIC USER	12:20:24	03-01-95 PAGE 0006	1ST CLM# 000465777
PHYSICIAN 06666 DOCTOR SIX			

Download the Reconciliation

Follow the instructions on page 106 to access the **SIS Application Portal**. Once in the **Data Transfer Utility** type **P2 Print Remittance Summary Report**. This report will automatically be sent to your printer. Printing this report will determine if the remittance is ready to be downloaded. If the report does not print, make another attempt later.

Once the report prints type **D** to download the Remittance. Press the **Enter** or **Tab** key. The cursor will move to the drive, press **Tab, Tab, Tab**. Type the file extension. Press **Enter**.

The file transfer will execute. A screen will appear stating the information is spooling. Once the transfer is complete the screen will change stating the number of records that have been successfully transferred. The file is now ready to be reconciled in PMP. Follow the instructions on page 58.

Renaming Your Manitoba Remit File

All Manitoba Health (MH) remit files are overwritten with subsequent remittances because they have the same name. If you rename the file after receiving it you can avoid issues that arise due to overwriting.

After you have downloaded the Remit file from MH and are ready to run it go to the **Manitoba** menu, **Reconcile Manitoba Health (MH) remittance file**. Click **Choose a Returns File**.

Right click your most recent remit file.



Choose **Rename** from the list. Type **Remit1.txt** or **RemitJune2006.txt**.

Hint: Remember to rename subsequent remit files sequentially and choose names that will allow you to identify the files.

Continue with normal reconcile procedure.